

# Opportunities Webinar

## *United Way of Whatcom County*



**Gary M. Goscenski**



**Kasey McGill**

A lighthouse on a rocky island at sunset. The lighthouse is a tall, tan-colored tower with a black lantern room and a small yellow flag on top. It stands on a dark, rocky outcrop. The background is a vibrant sunset sky with a bright orange sun low on the horizon, casting a glow over the scene. The water in the foreground is a mix of blue and green tones. The overall mood is serene and hopeful.

## Maximizing Your Impact, Resources, & Communication

Our mission and goal is to maximize the impact of every United Way, including yours, by providing consulting, planning, research, and ideas for you to seize your opportunities and address your challenges.

**Two Types of United Ways  
Direction-Setting Process  
2017 Donor Survey  
2017 Community Survey  
2017 Board/Staff Survey  
Partner Agency Meeting  
Top Campaign Interviews  
United Way Networking  
Issue Case Statements  
Bold Goal  
Next Steps**





Two  
Types

of

United  
Ways





**Fundraising-  
Focused**

**VS.**

**Issue-  
Focused**



# Fundraising-Focused

Raise funds

Some United Ways group issues and partner agencies into categories, such as education, income, and health

Solicit proposals from partner agencies (within categories if used)

Select and fund partners/programs (with proposals) that best serve the community's needs

# Fundraising Focus



**Raise \$2.5M to Fund Programs**

## Education Programs

**YMCA**

**School  
readiness**

**Girl  
Scouts**

**Life  
skills**

**United  
Way**

**School  
readiness**

## Income Program

**Food  
Bank**

**Hunger**

## Health Programs

**YMCA**

**Wellness**

**Crisis  
Center**

**Drug  
abuse**

# Goal

# Fundraising-Focused

United Way of Rusk County

About Us

Our Work

Partners

Our Community

LIVE UNITED



**GIVE.**

Invest in your community. ▶

EDUCATION. INCOME. HEALTH.

**ADVOCATE.**

Champion the cause. ▶

EDUCATION. INCOME. HEALTH.

**VOLUNTEER.**

Give your time. ▶

EDUCATION. INCOME. HEALTH.

**OPEN YOUR HEART. JOIN THE LIVE UNITED MOVEMENT**  
LEND YOUR MUSCLE. FIND YOUR VOICE.

## Headlines

The United Way of Rusk County is currently seeking applicants for the part-time position of Executive Director. Interested individuals should send a letter of interest and resume to Stacey Johnson at Henderson ISD, P.O. Box 728, Henderson, Texas 75653.

Eric Dieperink, Martin Lake Production Manager and 2014 Northern Region United Way Chair presents a check for \$11,000 to UW of Rusk County's Executive Director Shirley Crawford and Rick Hanning, UW of Rusk County President, Tournament Chair and Community Affairs Manager Martin Lake. The 2014 tournament had 21 teams.

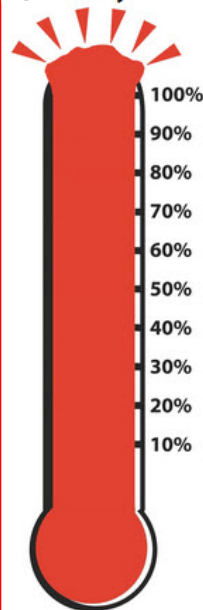
We thank Luminant for their continuous and generous support of the United Way of Rusk County!



2015 Campaign - Magnify Your Gift!

Campaign Goal  
2015

**\$250,000**



## 2015 Executive Board

United Way of Rusk County  
2015  
Executive Board

Stacey Johnson - President  
Mark Leitner - Vice President

John Cloutier - Co-Campaign Chairman  
Les Linebarger - Allocations Chairman

Suzanne Cross  
Bonnie Estes

William "Bill" Garmon

Matt Gholson

Tommy Goode

Weldon R. Gray

Sue Plummer

Monte Rouquette

Bill Preston - Interim Executive Director  
United Way of Rusk County

## 2016 United Way Funding Application



**United Way of Rusk County  
2016 Community Investment  
Funding Application**

- **April 24, 2015 by 4:00 p.m. on Friday** — Deadline for Community Investment Funding Applications to be returned to United Way of Rusk County.
- Please submit **original** (no copies required).
- Please note that completion of this form does not guarantee funding.

# Issue-Focused

Identify issue(s)

Determine actions to address the issue(s)

Select/Create partners to deliver actions

Secure necessary resources

# Issue Focus



**Increase the Graduation Rate to 92% by 2030**

**Programs Funded by Campaign, Grants, Sponsorships, etc.**

**YMCA**

**United Way**

**School readiness**

**School readiness**



**Convene Non-Funded Organizations Addressing the Graduation Rate**

**State Agency**

**School District**

**Health System**

**Church**

**School readiness**

**Middle school success**

**Third-grade reading**

**Middle school success**

The image is a screenshot of the United Way of Wells County website. At the top left, there is a dark blue banner with the text "LIVE UNITED" in white. To its right are three circular social media icons for Facebook, Twitter, and YouTube. Further right, the text "United Way of Wells County" is displayed in blue, followed by the United Way logo which features a stylized figure with arms raised inside a circle, with the words "United Way" above it. Below the header is a horizontal navigation menu with several items: "HOME", "ABOUT US", "GET INVOLVED", "PARTNERSHIPS", "EARLY CHILDHOOD INITIATIVE" (which is highlighted with a red border), "RESOURCES", "NEWS", "EVENTS", and "CONTACT".

The main content area features a large blue banner with a white border. On the left side of this banner, the text "90by20" is written in large white font. To the right of this text, the heading "90% READY BY 2020!" is displayed in white. Below the heading, a paragraph of text reads: "Our goal at United Way of Wells County is to have 90% of all children ready to enter kindergarten by 2020. But we need YOUR help!". Below this text is an orange button with the text "LEARN MORE".

Below the main banner is a horizontal bar with three options: "FOR BUSINESSES" (with a briefcase icon), "FOR INDIVIDUALS" (with a person icon), and "FOR FAMILIES" (with a family icon). The word "or" is placed between each option.

At the bottom of the page, there are three promotional cards. The first card on the left features a photo of a man holding a donation box and the heading "DONATE". Below the heading, it says "Use PayPal to directly give to United Way of Wells County!" and has an orange "GET STARTED!" button. The middle card features a photo of a smiling woman and the heading "2-1-1" with a star. Below the heading, it says "Get Connected. Get Answers." and "Available 24/7 to provide our community with the latest information." and has an orange "CONNECT!" button. The third card on the right features a photo of a woman and a child reading together and the heading "IMAGINATION LIBRARY". Below the heading, it says "Enroll your child today!" and has an orange "SIGN-UP!" button.

# Goal

# Issue

The screenshot shows the United Way website header with the logo and the text "LIVE UNITED" and "United Way of Wayne & Holmes Counties". The main content area features a large graphic with the number "10,006" in blue, an upward-pointing arrow, and the text "OUT of POVERTY by 2025" in white and yellow. Below the number is a silhouette of a diverse group of people, including a person with a cane, a person with a stroller, and a child. A red button labeled "DONATE" and a blue button labeled "2-1-1 GET HELP" are visible on the right side of the graphic. Below the graphic, the text "Get Involved" is displayed in a blue font. A red-bordered box contains the text: "Poverty is everyone's issue. It takes all of us working together on a common agenda. It takes you. Join us."



# Fundraising

Whatever partners address  
(within categories)

Raise money to fund  
programs (within categories)

Investment of \$ raised  
or \$ allocated

Achieve campaign goal/  
Amount invested

Provide and prioritize  
resources (within categories)

# Issue

Poverty

By 2025, reduce poverty  
by 50%

Poverty level

Reduced poverty

Lead issue

**Issues:**

**Goal:**

**Measure:**

**Results:**

**Role:**

# Fundraising

Evaluate partner agency requests, allocate funding (within categories)

Successful workplace campaign

Promote campaign and partner agencies (within categories)

# Issue

Identify/Select strategies to address the issue

Identify/Secure resources to address the issue

Attract and engage donors and volunteers around the issue

Impact/  
Investment:

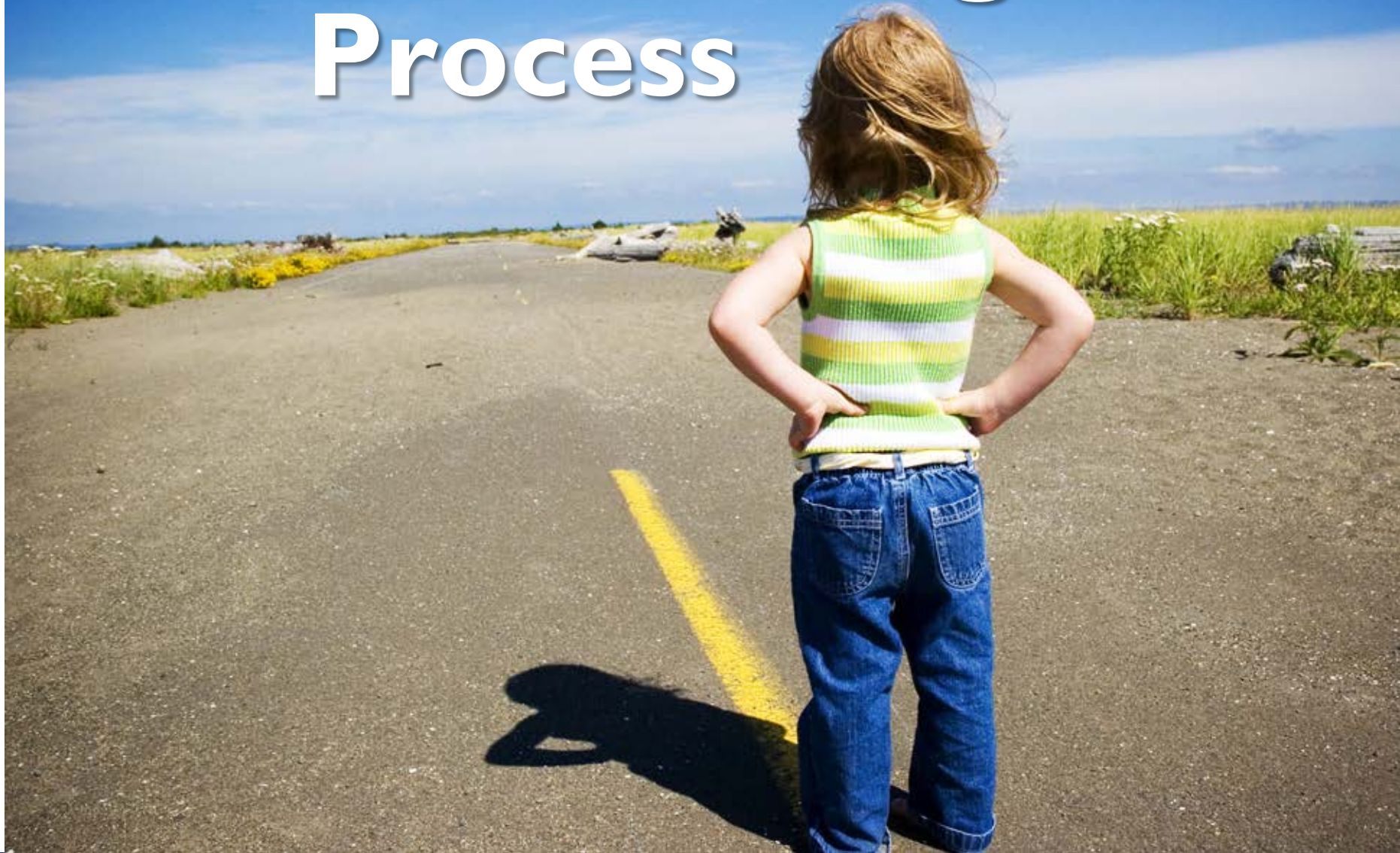
Resource  
Development:

Marketing/  
Engagement:

**Do you have any  
questions about  
an issue focus?**



# Direction-Setting Process



# Four Steps to the Process



**Introduction**



**Understanding**



**Opportunities**



**Direction**





# Introduction

**July 26, 2016:** We met with the board and staff of United Way of Whatcom County to discuss community impact, the differences between fundraising-focused and issue-focused United Ways, donor-centric methods, a call to action, and board responsibilities.

**November 2-3, 2016:** We held conference calls to discuss our Direction-Setting process, the schedule, and research activities.



# Understanding

**November 2016 – March 2017:** After our conference calls, we developed and sent out board/staff, donor, and community surveys, to gain an understanding of your board/staff members' priorities related to the Direction-Setting process, donors' opinions and support, and community members' opinions.

United Way of Whatcom County met with partner agencies, had conversations with top campaigns, prepared issue case statements, and learned from other United Ways who have transformed to an issue focus.



# Opportunities

**Today, March 23, 2017:** We prepared this Opportunities webinar to share the results of the board/staff, donor, and community surveys, as well as the results of the partner agency meeting, top campaign conversations, and networking with other United Ways.

The purpose of this webinar is to learn from the information collected and to explore the opportunities for your United Way.



# Direction

**April 19, 2017:** The final step of our Direction-Setting process is to determine the vision and direction for the future of United Way of Whatcom County during the Direction-Setting session.

This session will use the information collected, along with internal discussion, to develop a clear vision and direction for the future of United Way of Whatcom County.

**Do you have any  
questions about our  
Direction-Setting  
process?**



# 2017 Donor Survey

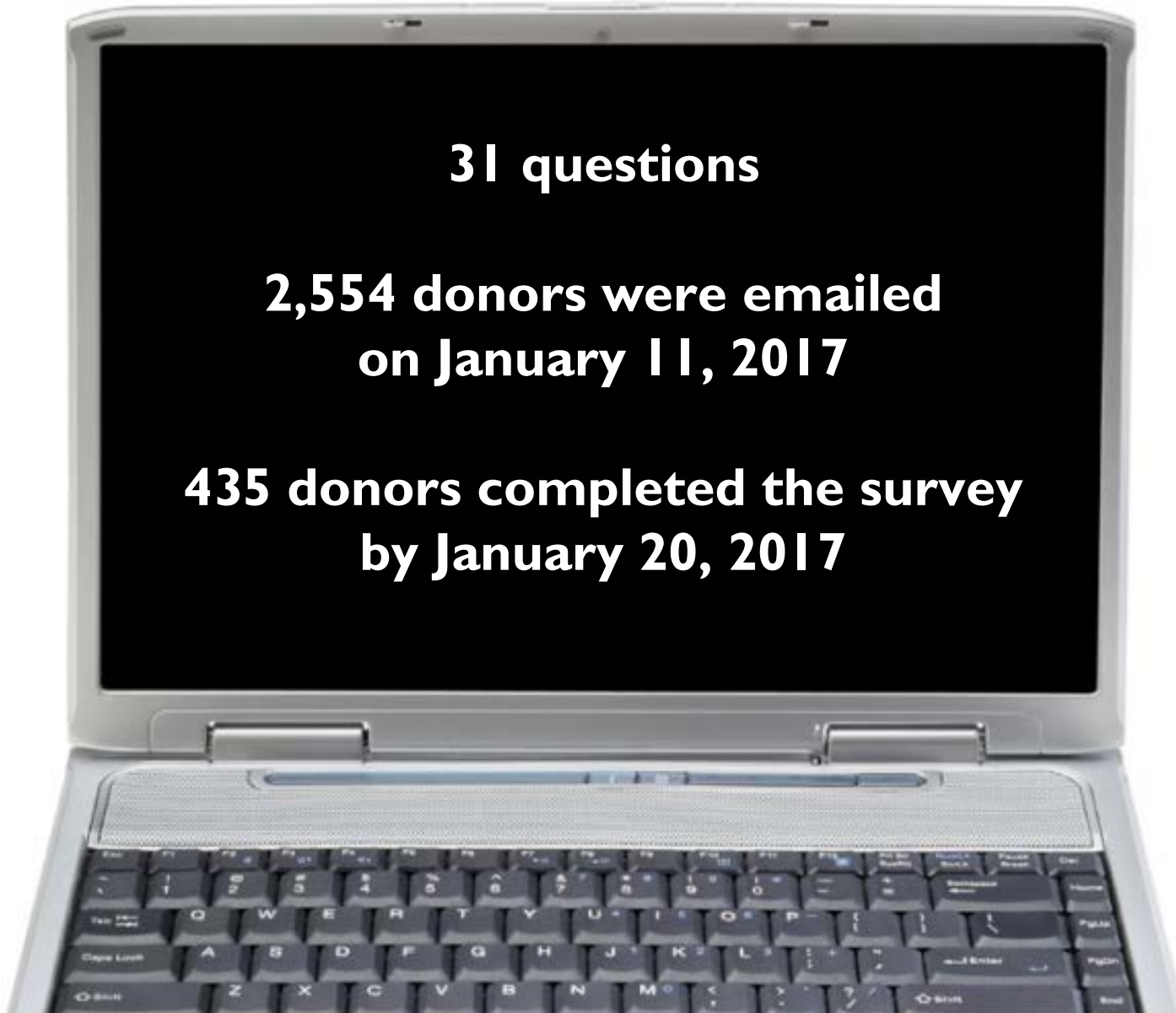


# General Overview of Survey

**31 questions**

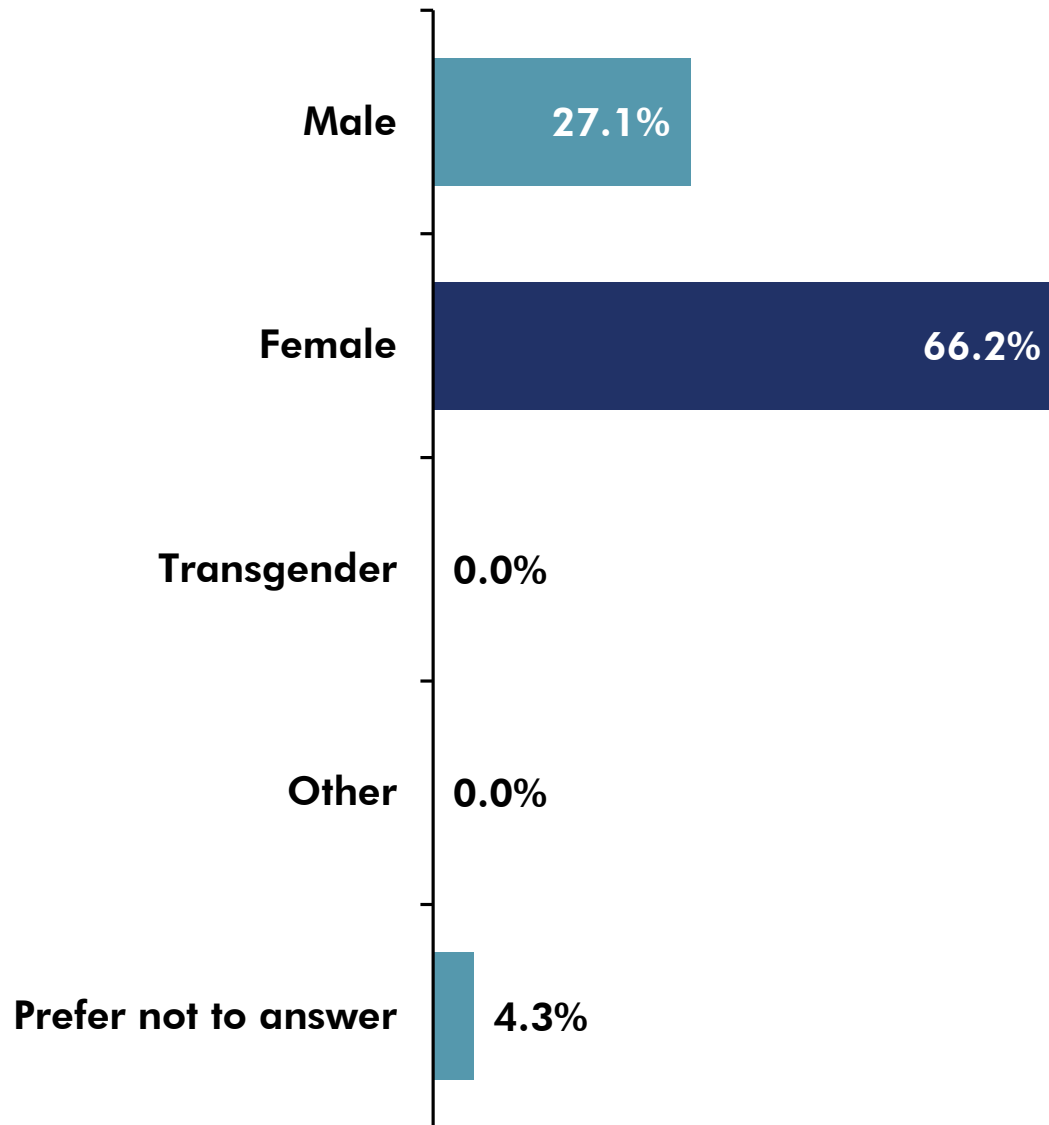
**2,554 donors were emailed  
on January 11, 2017**

**435 donors completed the survey  
by January 20, 2017**

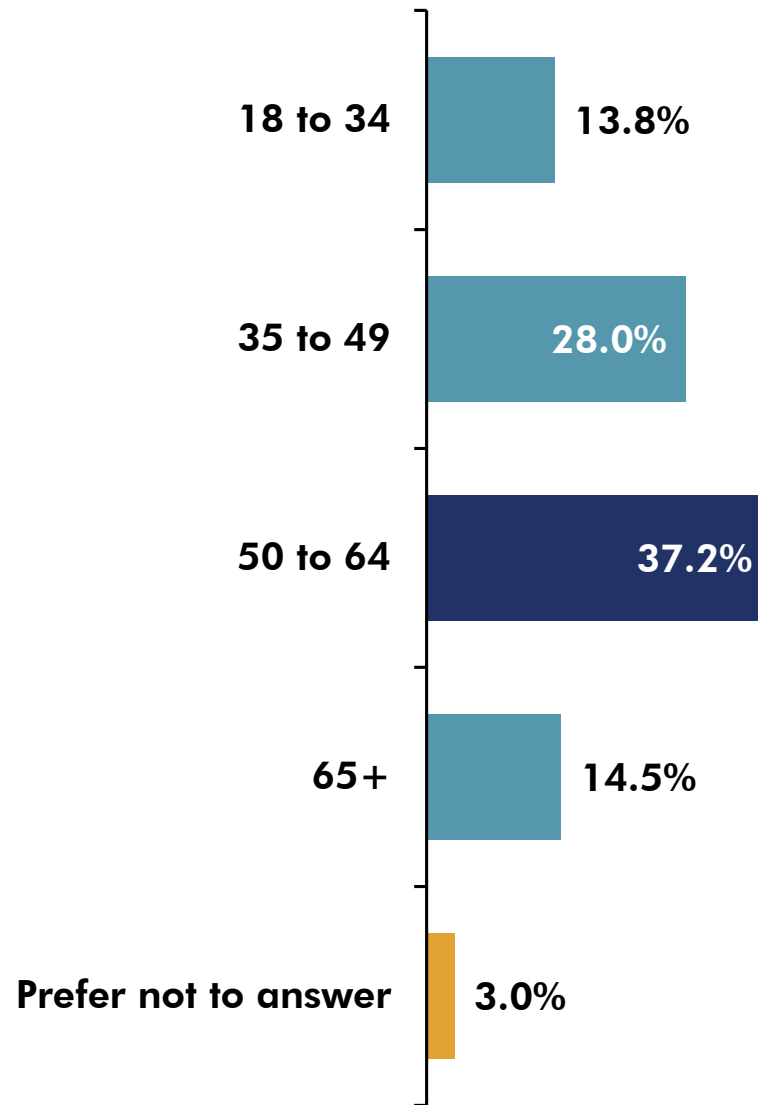


# Donor Profile

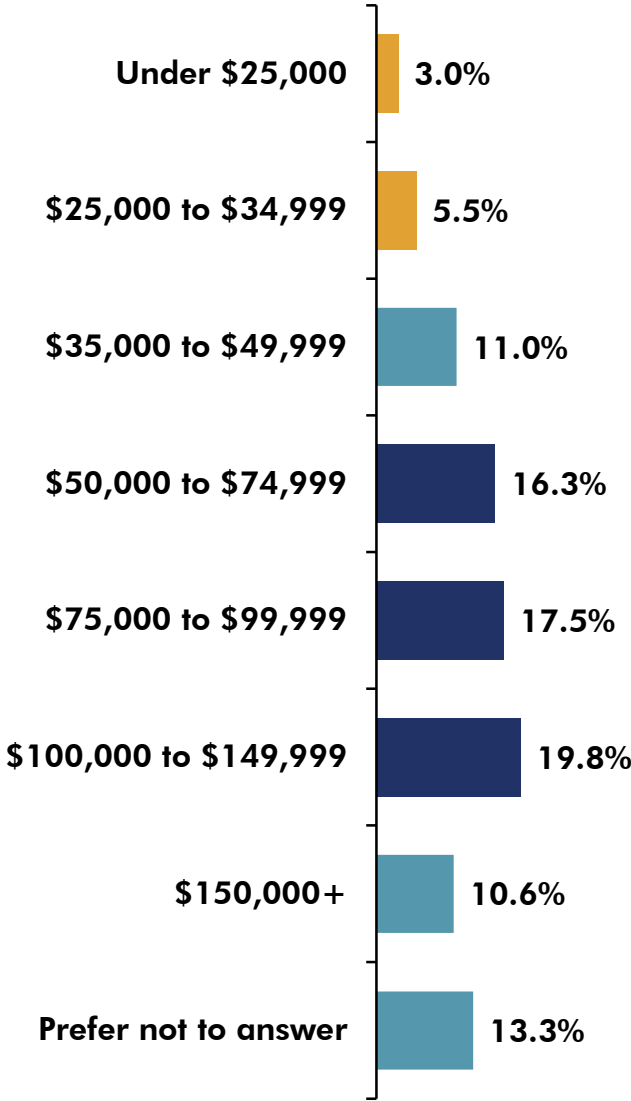
# Gender of Donors



# Age of Donors



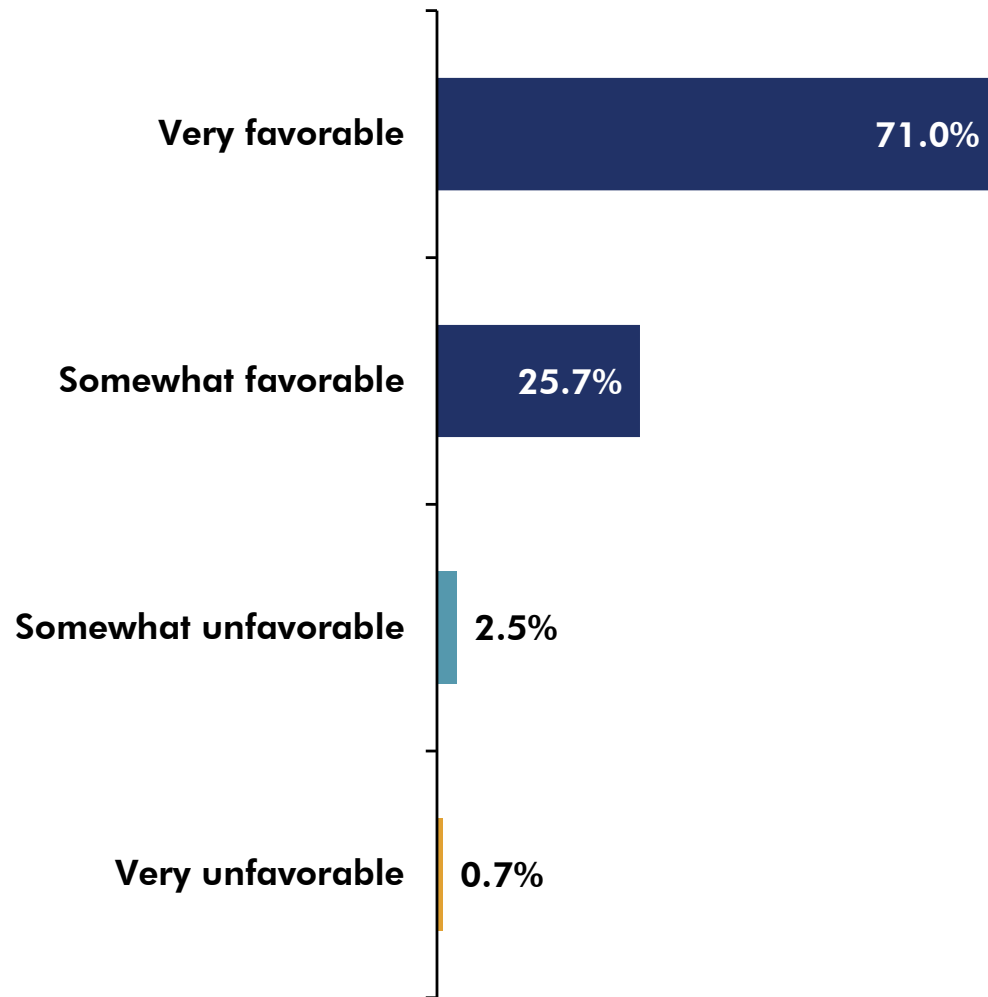
# Household Income of Donors



Question: Which range best represents your total household income before taxes?

# General Questions

# Overall Opinion of United Way of Whatcom County



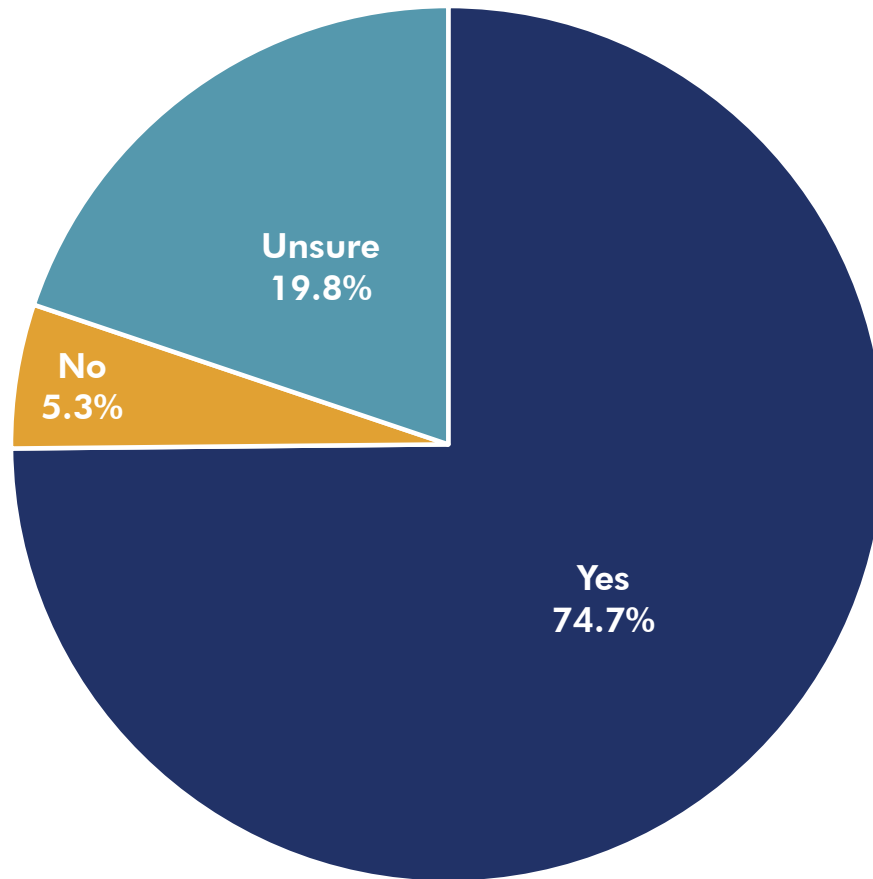
Question: Thinking about everything you know, what is your overall opinion of United Way of Whatcom County?

# Words That Come to Mind



Question: What three words or short phrases come to mind when you think of United Way of Whatcom County?

# Take a Leadership Role in Identifying/Addressing Issues



Question: Do you think United Way of Whatcom County should take a leadership role in identifying and addressing the most important and pressing issues for Whatcom County?

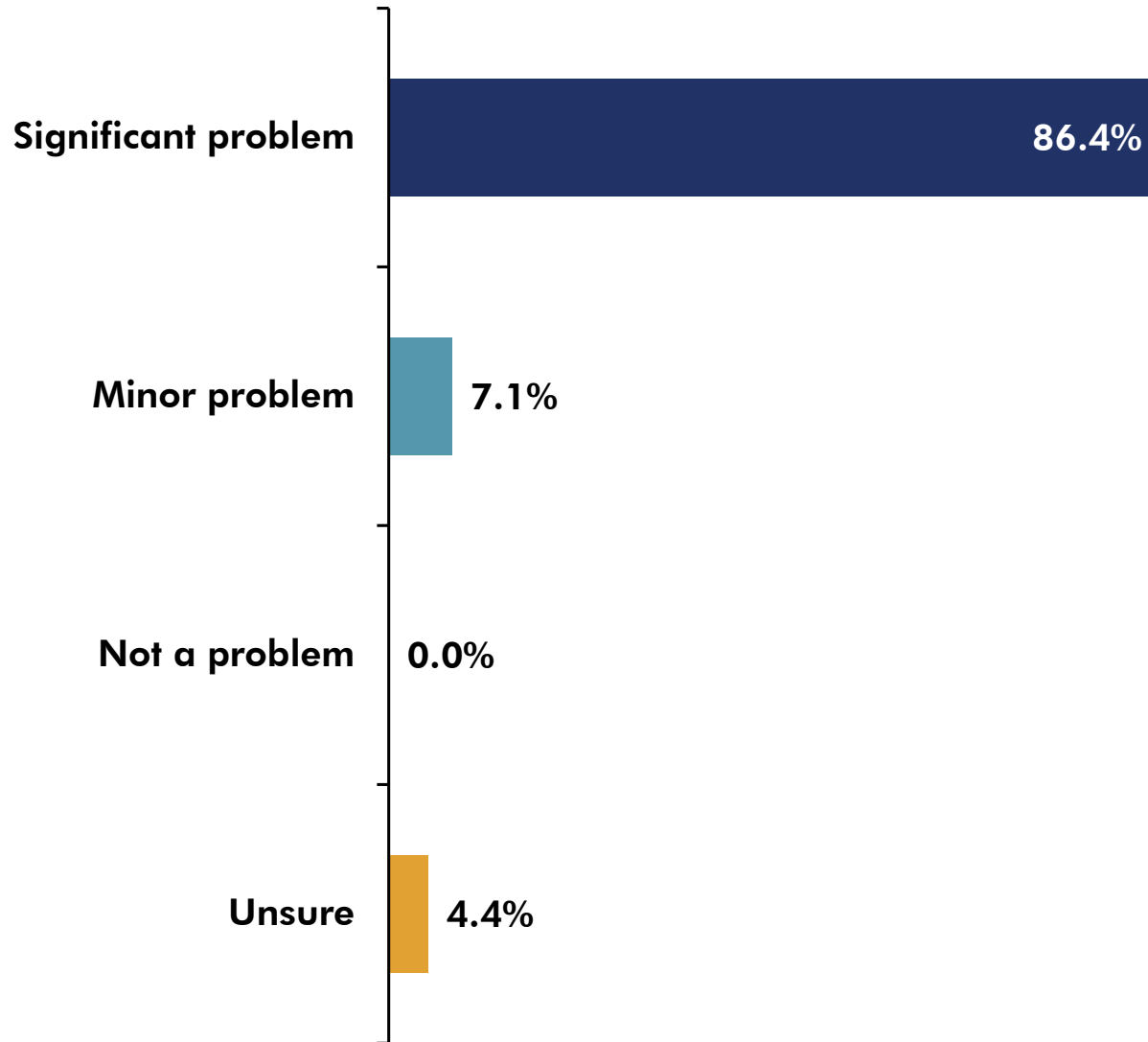
# Social Issues

# Most Significant Social Issues

	% Total	Top Issue	Second Issue	Third Issue
<b>Affordable housing</b>	<b>45.8%</b>	<b>24.8%</b>	<b>13.6%</b>	<b>7.4%</b>
<b>Homelessness</b>	<b>43.6%</b>	<b>22.5%</b>	<b>13.1%</b>	<b>8.0%</b>
<b>Mental health</b>	<b>39.3%</b>	<b>6.2%</b>	<b>16.1%</b>	<b>17.0%</b>
Poverty	24.6%	9.7%	6.9%	8.0%
Access to health care	20.0%	6.0%	7.6%	6.4%
Substance abuse	17.3%	3.7%	5.3%	8.3%
Hunger	15.2%	3.7%	7.1%	4.4%
Child abuse/neglect	13.6%	4.8%	4.4%	4.4%
Youth concerns (social/life skills)	13.6%	3.0%	4.4%	6.2%
Child care	12.9%	2.5%	5.3%	5.1%
Lack of parenting skills	8.0%	1.4%	3.2%	3.4%
Domestic violence	6.9%	0.5%	1.8%	4.6%
Senior citizen concerns	6.9%	1.8%	1.4%	3.7%
Kindergarten readiness	6.1%	1.8%	1.8%	2.5%
Childhood literacy	4.6%	0.9%	2.1%	1.6%
Graduation rates	4.3%	1.1%	1.8%	1.4%
Unemployment	3.9%	1.6%	0.7%	1.6%
Other		2.8%	1.6%	2.8%
Unsure		0.5%	0.7%	1.8%

Question: What do you think are the three most significant social issues facing residents in Whatcom County?

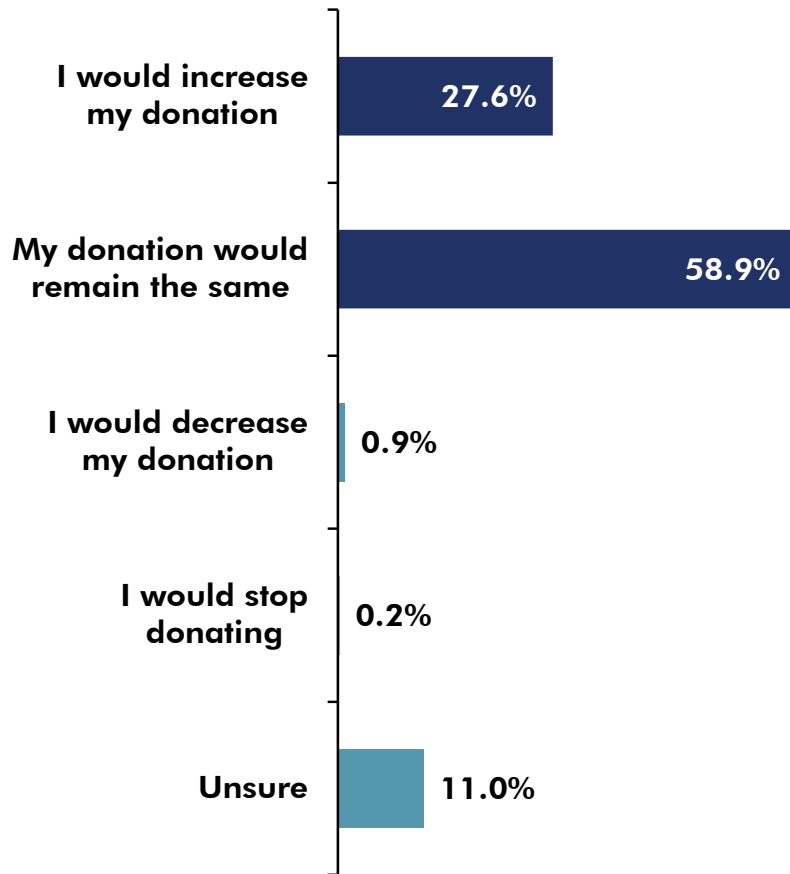
# Consider Families in Poverty a Problem



Question: Do you consider families in poverty to be a significant problem, a minor problem, or not a problem in Whatcom County?

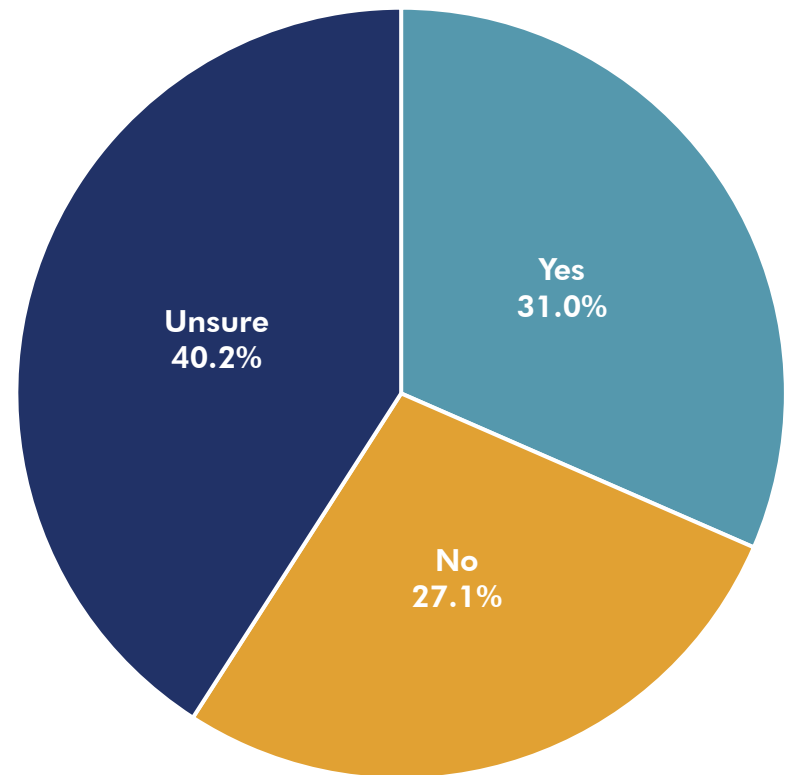
# Families in Poverty

## Change in Contribution



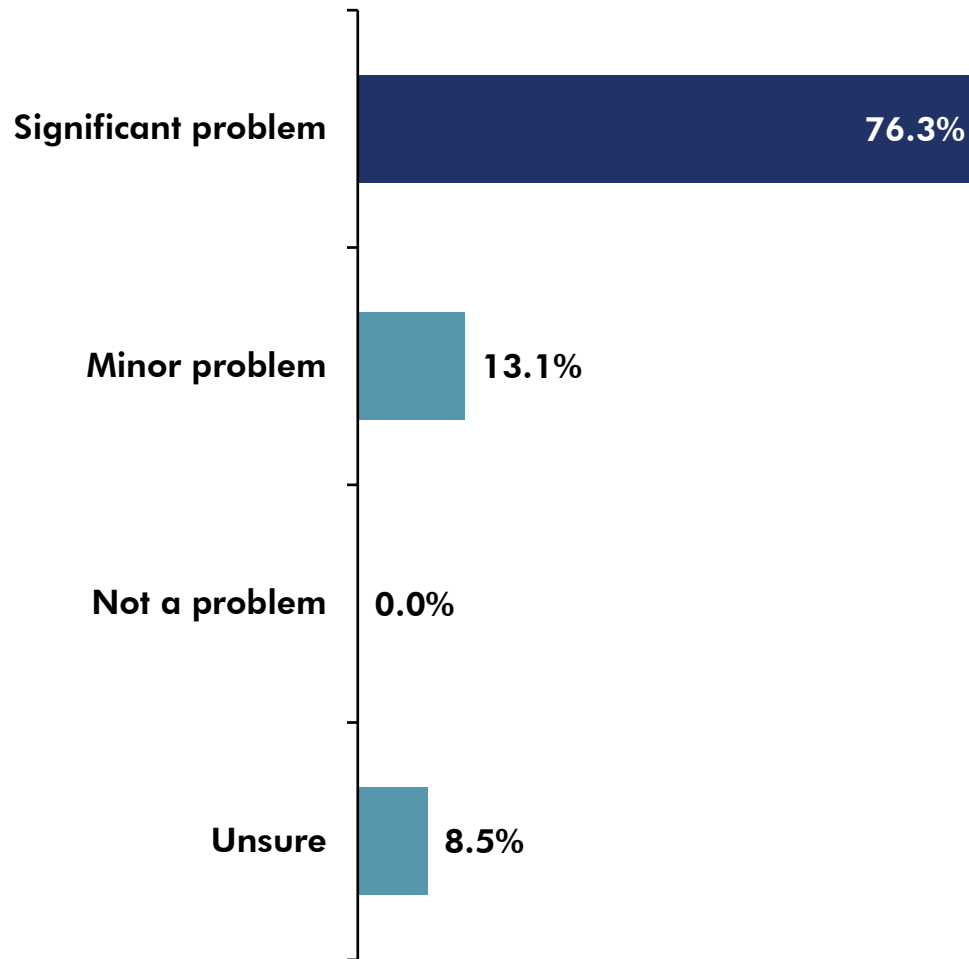
Question: If United Way of Whatcom County took the lead to reduce families in poverty, how would this affect your contribution to United Way of Whatcom County?

## Consider Volunteering



Question: Would you consider volunteering with United Way of Whatcom County to reduce families in poverty in Whatcom County?

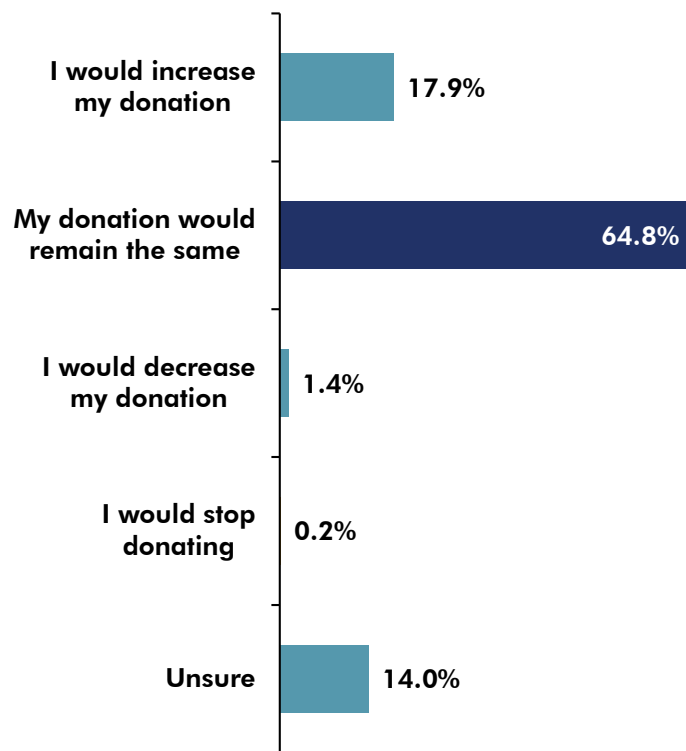
# Consider Employed Families Who Struggle Financially a Problem



Question: Do you consider employed families who struggle financially to be a significant problem, a minor problem, or not a problem in Whatcom County?

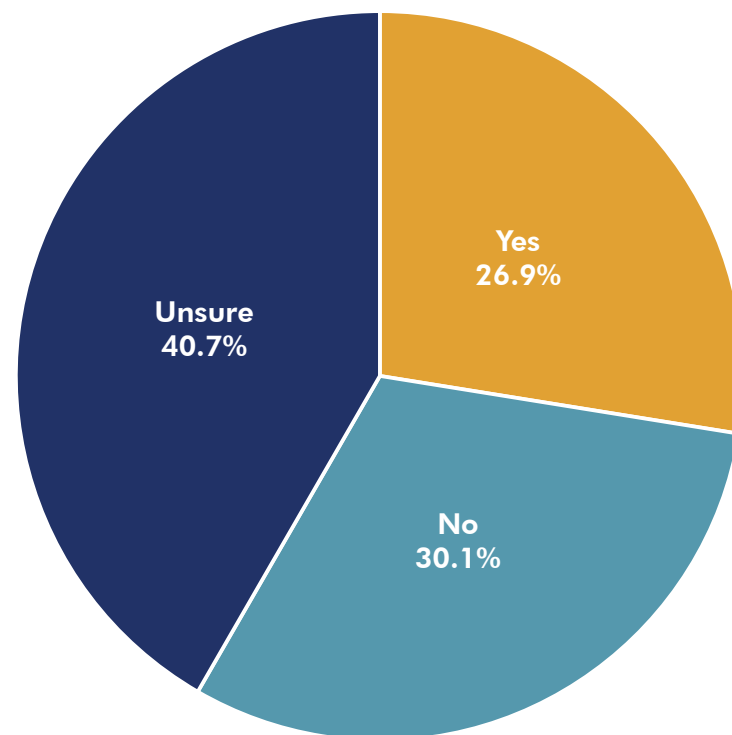
# Employed Families Who Struggle Financially

## Change in Contribution



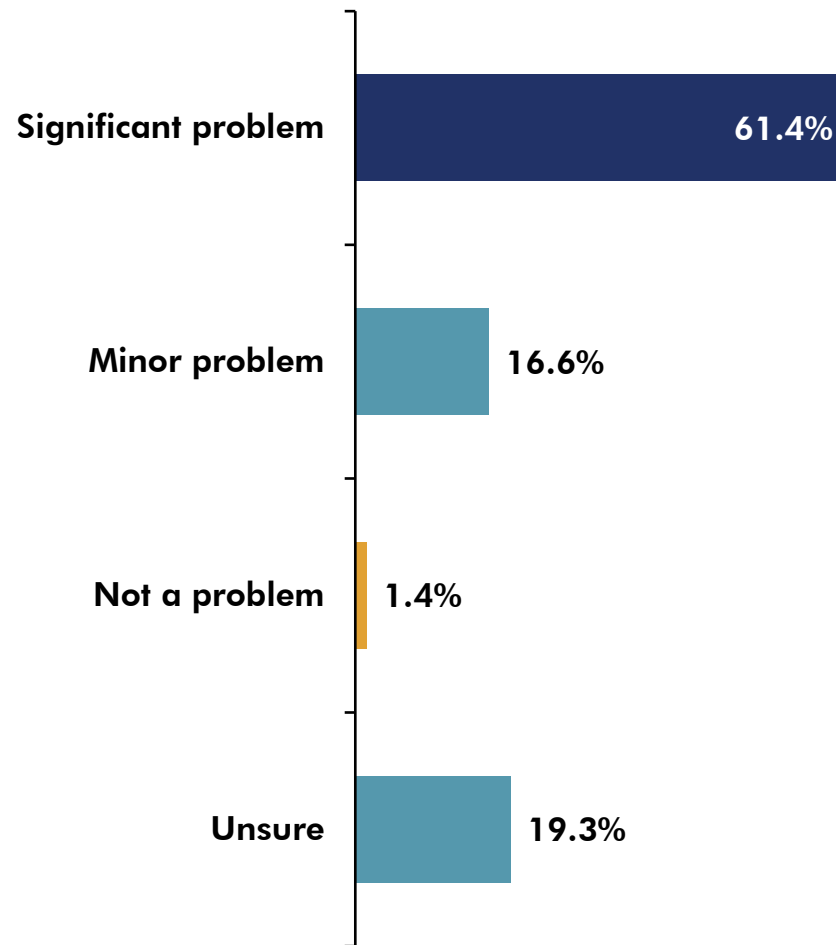
Question: If United Way of Whatcom County took the lead to decrease the number of employed families who struggle financially, how would this affect your contribution to United Way of Whatcom County?

## Consider Volunteering



Question: Would you consider volunteering with United Way of Whatcom County to decrease the number of employed families who struggle financially in Whatcom County?

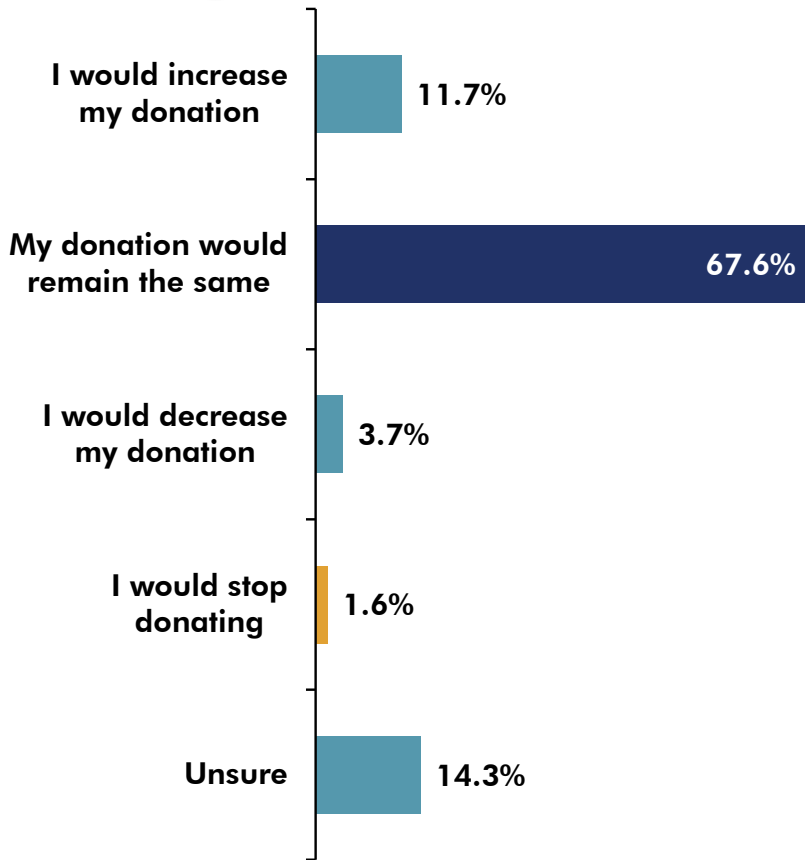
# Consider Not Reading at Third-Grade Level a Problem



Question: Do you consider children not reading at grade level by the end of third grade to be a significant problem, a minor problem, or not a problem in Whatcom County?

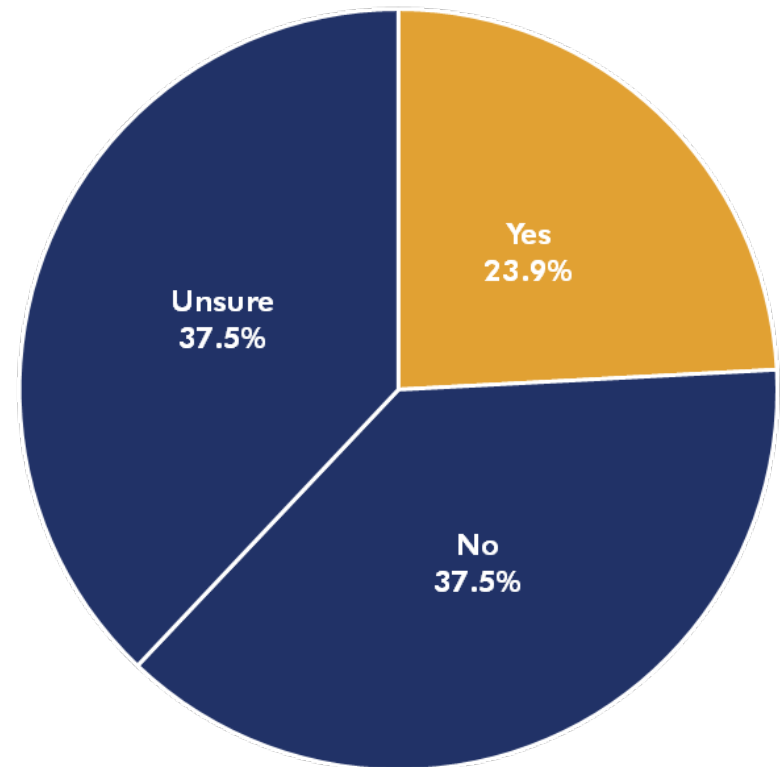
# Not Reading at Third-Grade Level

## Change in Contribution



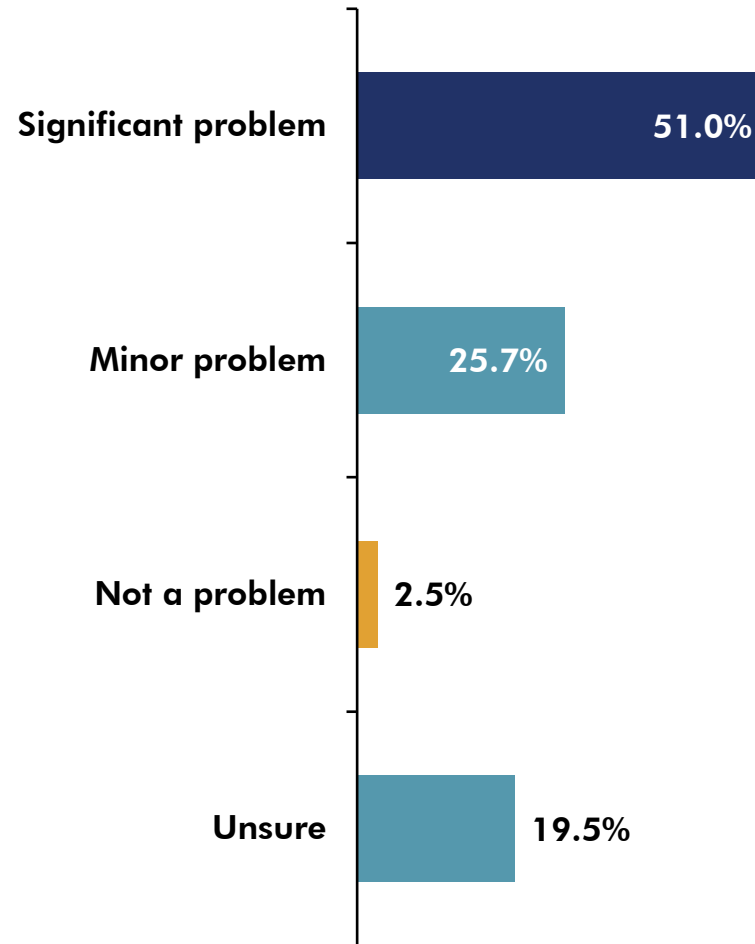
Question: If United Way of Whatcom County took the lead to increase the number of children reading at grade level by the end of third grade, how would this affect your contribution to United Way of Whatcom County?

## Consider Volunteering



Question: Would you consider volunteering with United Way of Whatcom County to increase the number of children reading at grade level by the end of third grade in Whatcom County?

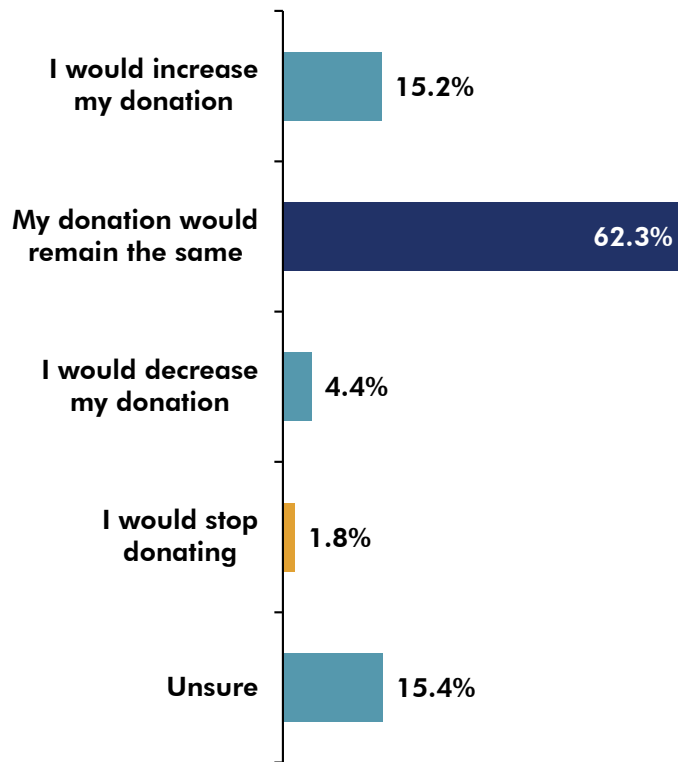
# Consider Children Entering Kindergarten Unprepared to Learn a Problem



Question: Do you consider children entering kindergarten unprepared to learn to be a significant problem, a minor problem, or not a problem in Whatcom County?

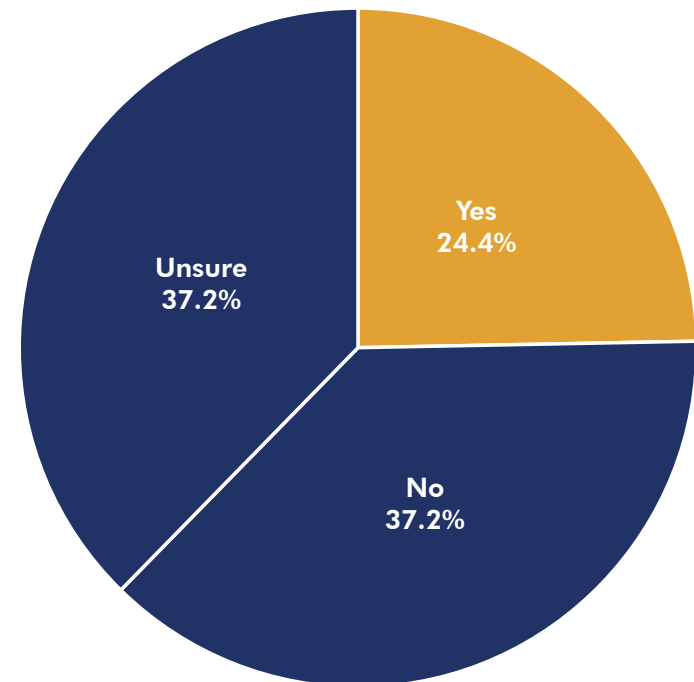
# Children Entering Kindergarten Unprepared to Learn

## Change in Contribution



Question: If United Way of Whatcom County took the lead to increase the number of children entering kindergarten prepared to learn, how would this affect your contribution to United Way of Whatcom County?

## Consider Volunteering



Question: Would you consider volunteering with United Way of Whatcom County to increase the number of children entering kindergarten prepared to learn in Whatcom County?

# Issue Comparison

## Consider Issue a Significant Problem

Families in Poverty	86.4%
Employed Families Who Struggle Financially	76.3%
Children Not Reading at Third-Grade Level	61.4%
Children Entering Kindergarten Unprepared to Learn	51.0%

# Issue Comparison

## Change in Contribution if United Way Took the Lead to Address Issue

	Increase	Remain the Same	Decrease	Stop Donating
Families in Poverty	27.6%	58.9%	0.9%	0.2%
Employed Families Who Struggle Financially	17.9%	64.8%	1.4%	0.2%
Children Not Reading at Third-Grade Level	11.7%	67.6%	3.7%	1.6%
Children Entering Kindergarten Unprepared to Learn	15.2%	62.3%	4.4%	1.8%

# Issue Comparison

## Would Consider Volunteering to Address Issue

Families in Poverty	31.0%
Employed Families Who Struggle Financially	26.9%
Children Not Reading at Third-Grade Level	23.9%
Children Entering Kindergarten Unprepared to Learn	24.4%

# What We Learned

- Half of donors are over age 50, and half have a household income between \$50,000 and \$149,999.
- Nearly three-fourths of donors think United Way of Whatcom County should take a leadership role in identifying and addressing the most important and pressing issues for Whatcom County.

# What We Learned

- More donors named poverty as one of the top three issues than kindergarten readiness and childhood literacy. However, United Way of Whatcom County will need to increase awareness and understanding of whatever issue you select.
- Donors consider families in poverty to be a more significant problem, and are more likely to increase their contribution and/or volunteer to address the issue than the other three issues tested on the survey.

# What We Learned

- United Way of Whatcom County could pick any of the four issues being considered, however, more effort will be required to attract and engage donors if an issue other than families in poverty is selected.

**Do you have any  
questions about  
the donor survey?**



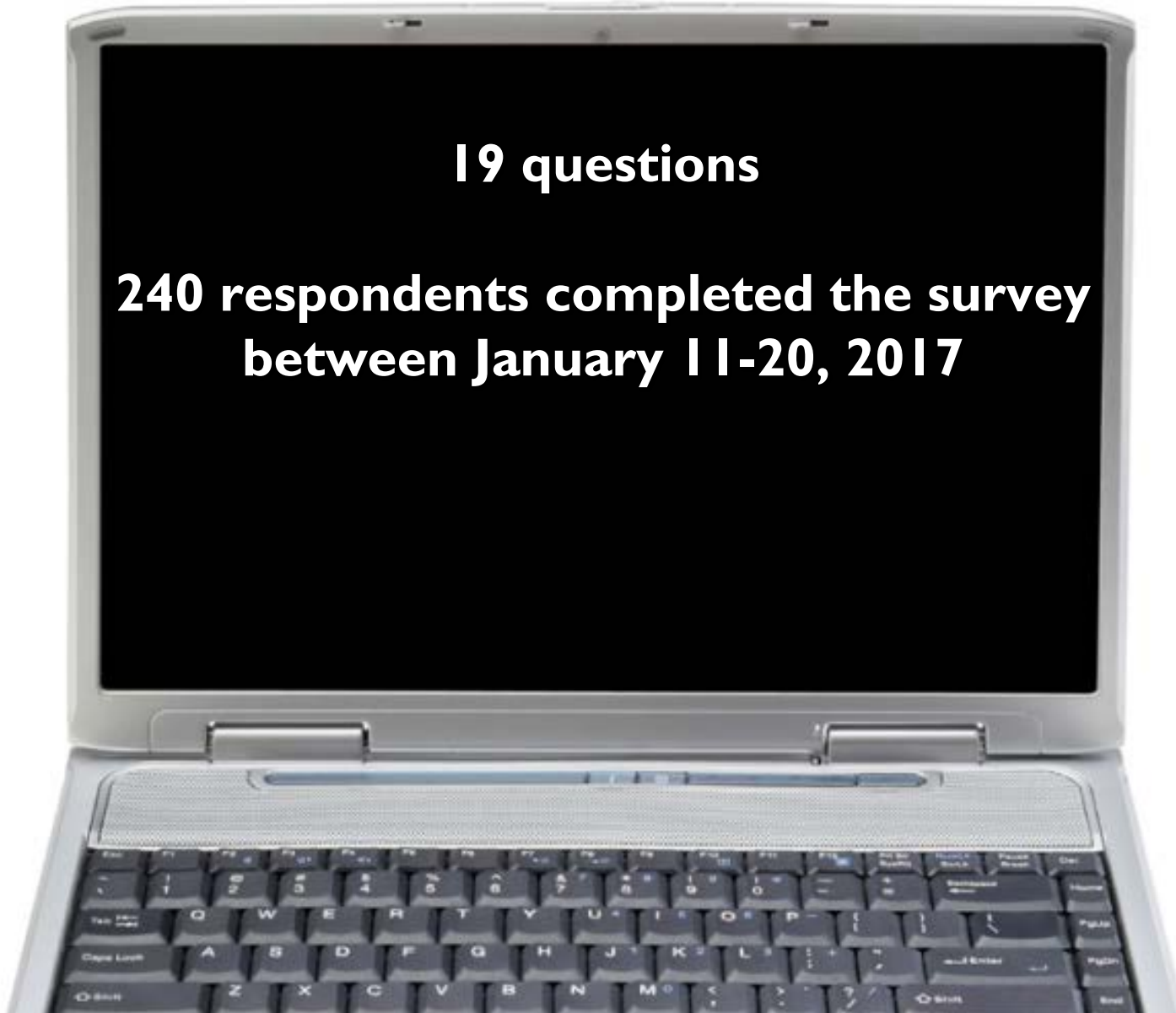
An aerial photograph of a suburban residential neighborhood. The houses are mostly single-story with red-tiled roofs and light-colored walls. The streets are paved and curve through the area. There are green lawns, trees, and some swimming pools visible. The overall scene is a typical suburban development.

# 2017 Community Survey

# General Overview of Survey

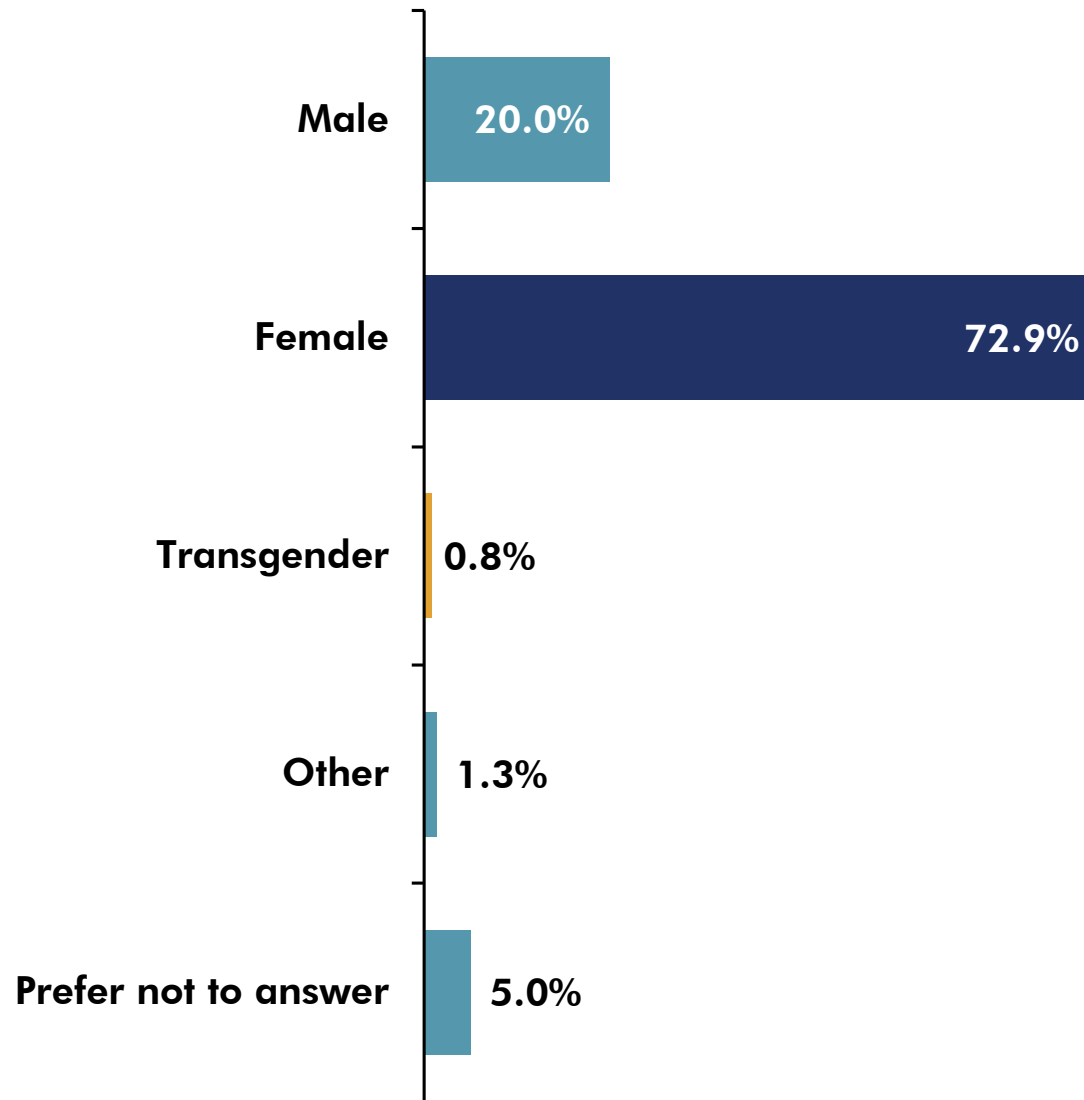
**19 questions**

**240 respondents completed the survey  
between January 11-20, 2017**

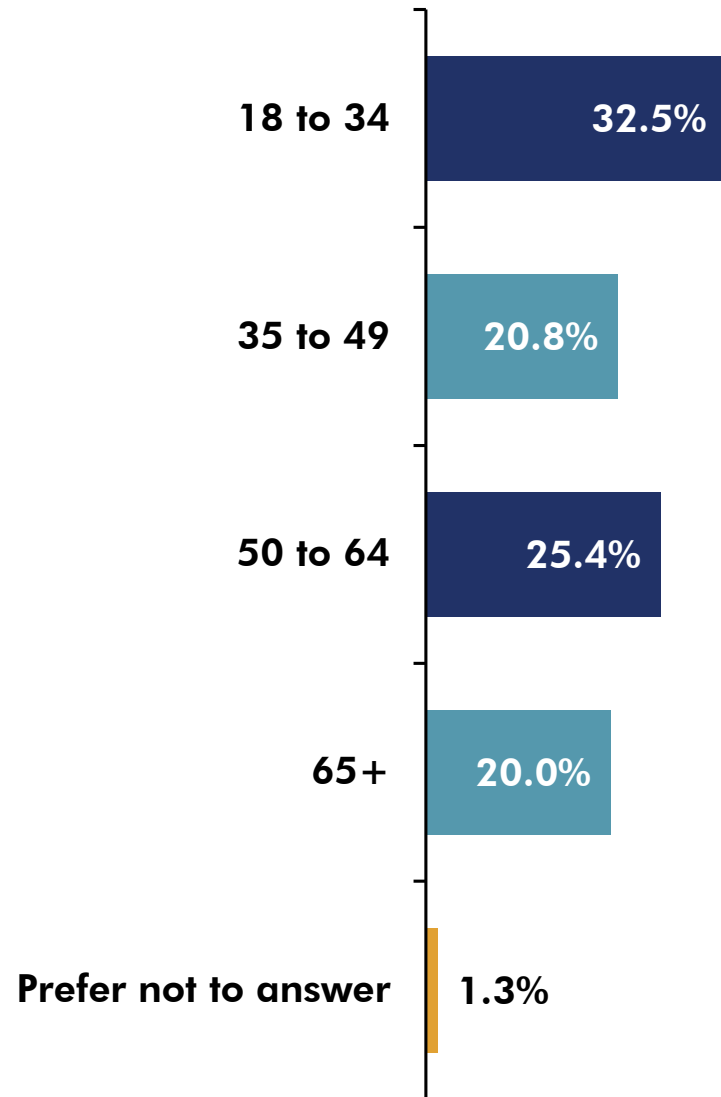


# Respondent Profile

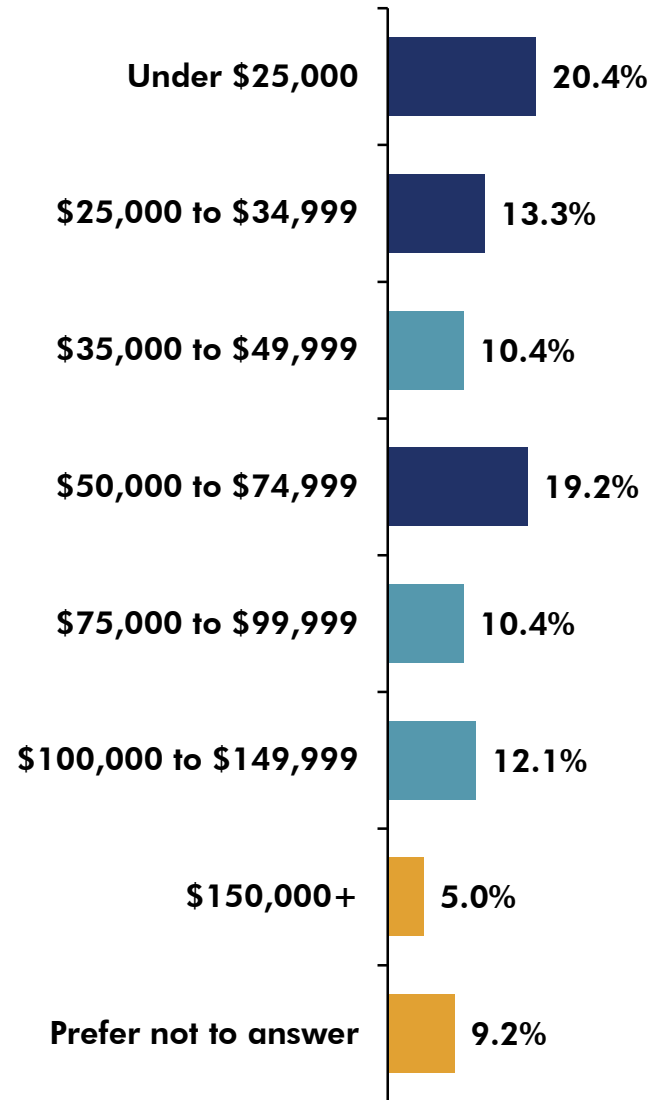
# Gender of Respondents



# Age of Respondents



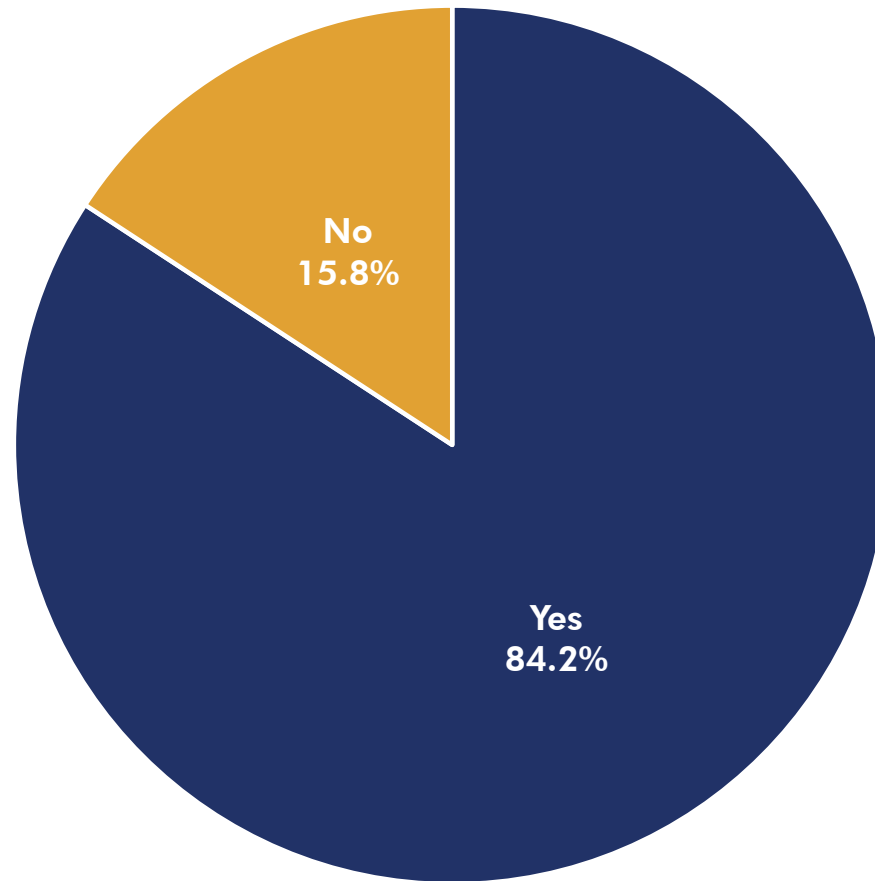
# Household Income of Respondents



Question: Which range best represents your total household income before taxes?

# General Questions

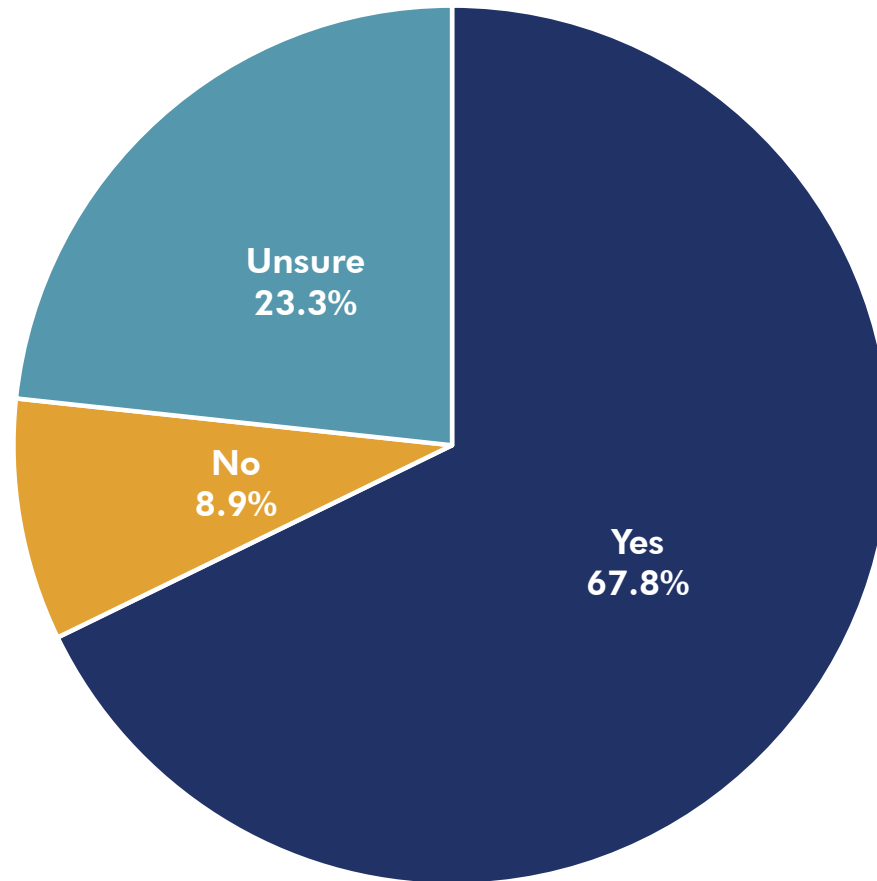
# Heard of United Way of Whatcom County



Question: Prior to this survey, had you heard of United Way of Whatcom County?



# Take a Leadership Role in Identifying/Addressing Issues



Question: Do you think United Way of Whatcom County should take a leadership role in identifying and addressing the most important and pressing issues for Whatcom County?

# Social Issues

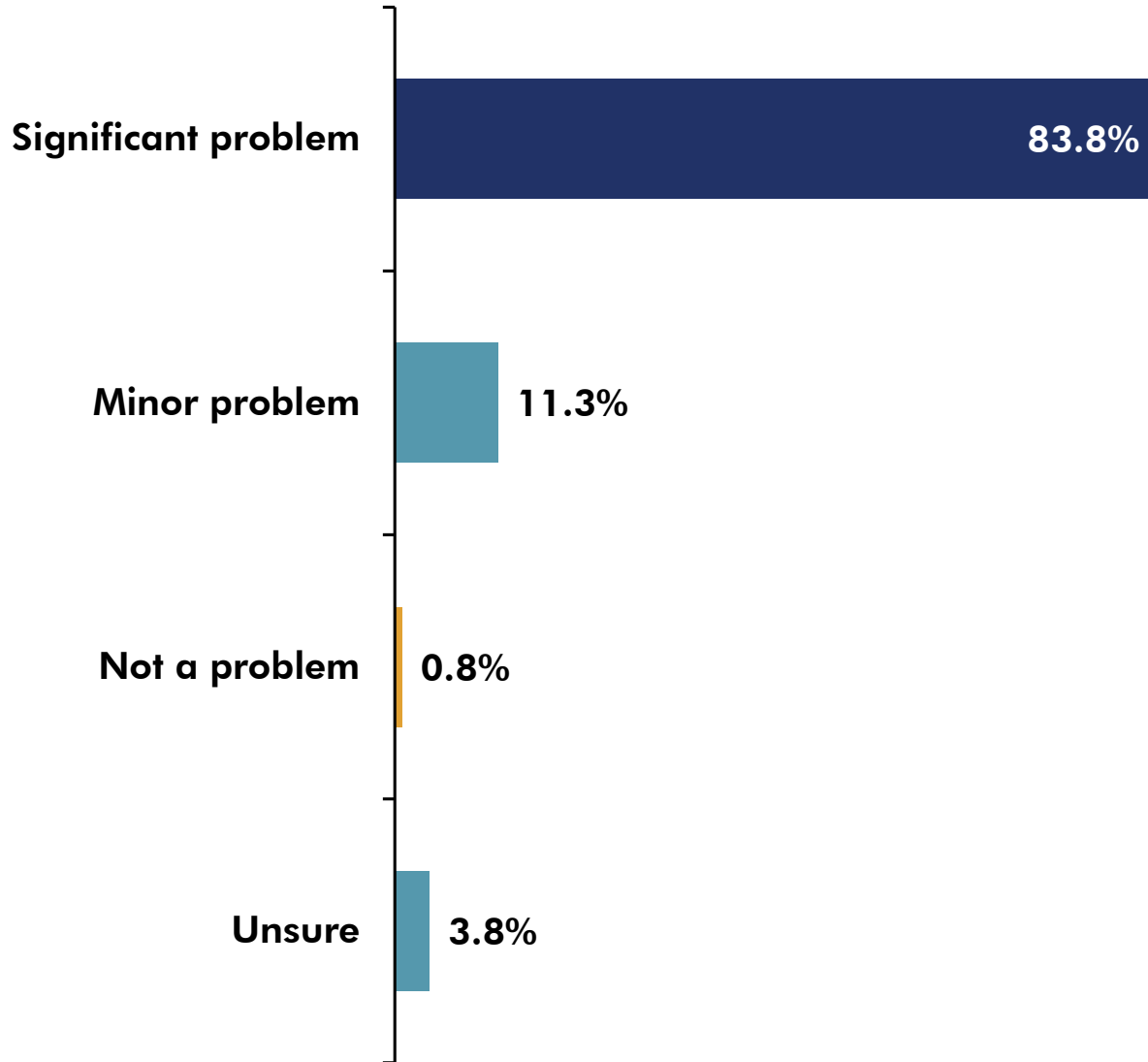


# Most Significant Social Issues

	% Total	Top Issue	Second Issue	Third Issue
<b>Affordable housing</b>	<b>59.3%</b>	<b>26.3%</b>	<b>21.7%</b>	<b>11.3%</b>
<b>Homelessness</b>	<b>57.0%</b>	<b>30.4%</b>	<b>18.3%</b>	<b>8.3%</b>
<b>Mental health</b>	<b>37.5%</b>	<b>9.6%</b>	<b>15.8%</b>	<b>12.1%</b>
Poverty	24.2%	8.3%	6.3%	9.6%
Substance abuse	23.3%	5.0%	7.5%	10.8%
Access to health care	20.0%	3.3%	6.7%	10.0%
Hunger	10.8%	2.5%	3.3%	5.0%
Unemployment	10.5%	2.9%	1.3%	6.3%
Youth concerns (social/life skills)	9.6%	1.3%	3.3%	5.0%
Lack of parenting skills	7.9%	1.3%	3.3%	3.3%
Child abuse/neglect	6.6%	0.8%	2.9%	2.9%
Domestic violence	4.6%	0.8%	1.7%	2.1%
Child care	4.2%	1.7%	0.8%	1.7%
Senior citizen concerns	4.2%	0.0%	2.1%	2.1%
Childhood literacy	1.7%	0.0%	0.0%	1.7%
Kindergarten readiness	1.7%	0.0%	0.4%	1.3%
Graduation rates	0.8%	0.4%	0.0%	0.4%
Other		3.8%	3.8%	2.5%
Unsure		1.7%	0.8%	3.3%

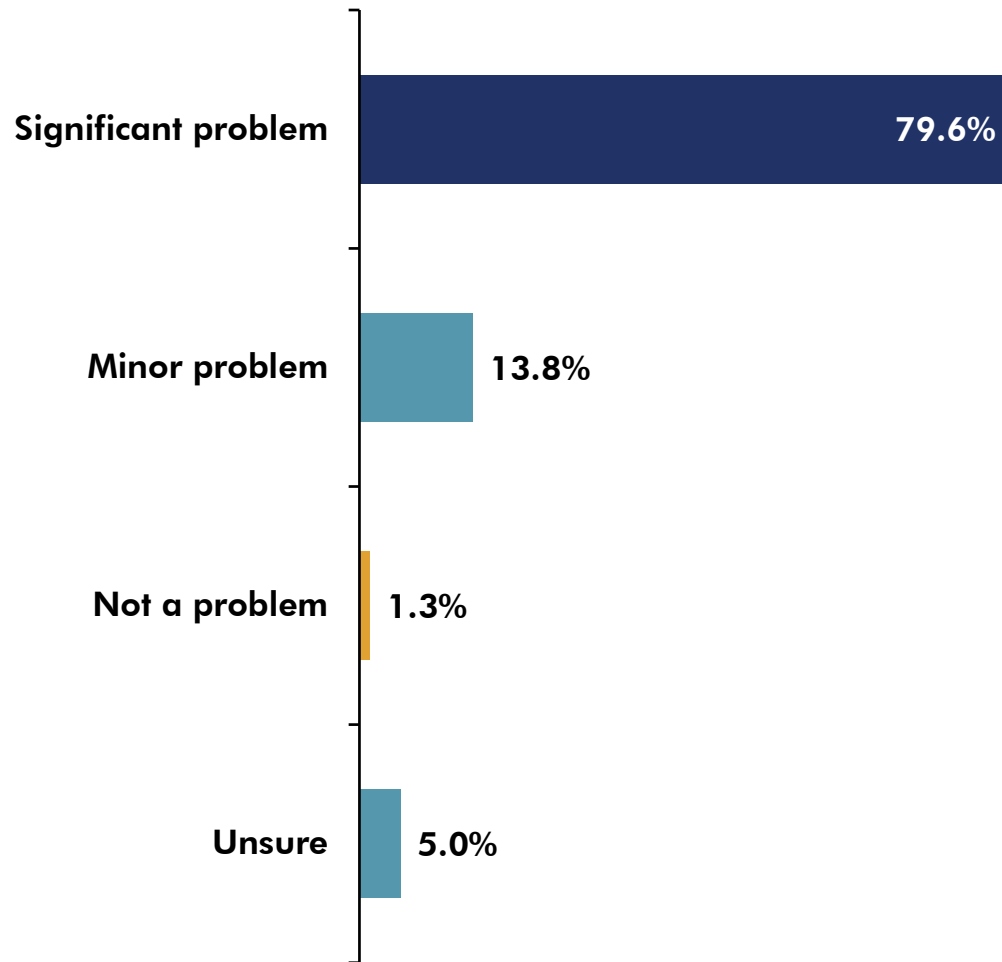
Question: What do you think are the three most significant social issues facing residents in Whatcom County?

# Consider Families in Poverty a Problem



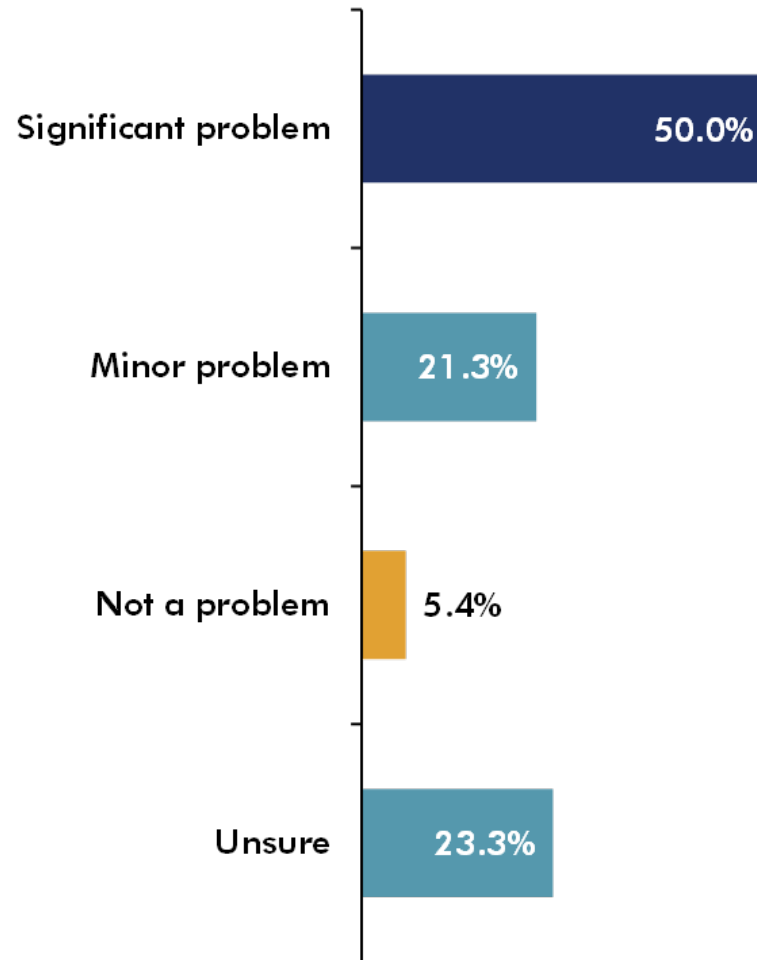
Question: Do you consider families in poverty to be a significant problem, a minor problem, or not a problem in Whatcom County?

# Consider Employed Families Who Struggle Financially a Problem



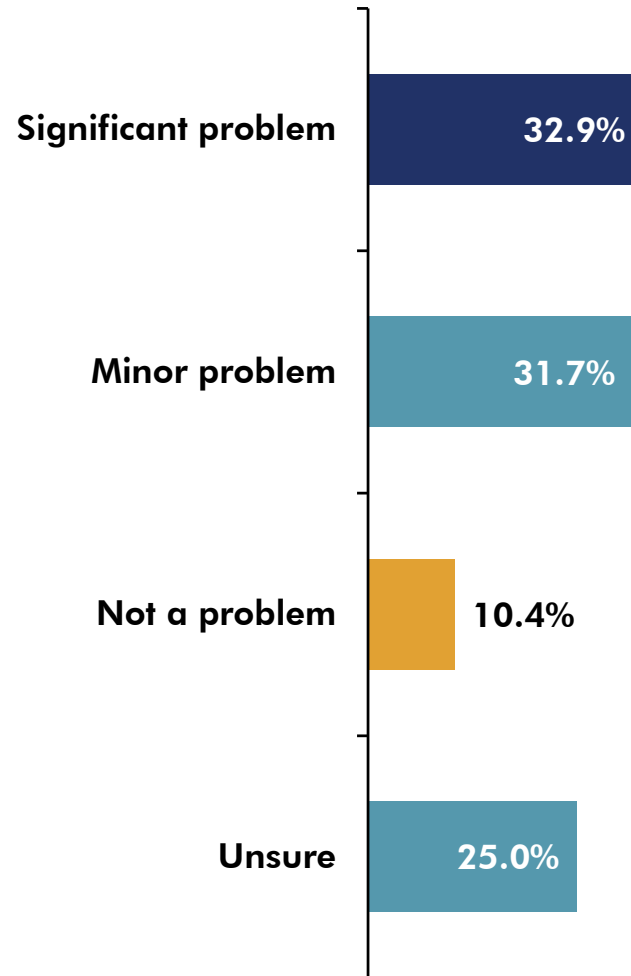
Question: Do you consider employed families who struggle financially to be a significant problem, a minor problem, or not a problem in Whatcom County?

# Consider Not Reading at Third-Grade Level a Problem



Question: Do you consider children not reading at grade level by the end of third grade to be a significant problem, a minor problem, or not a problem in Whatcom County?

# Consider Children Entering Kindergarten Unprepared to Learn a Problem



Question: Do you consider children entering kindergarten unprepared to learn to be a significant problem, a minor problem, or not a problem in Whatcom County?

# What We Learned

- Just as we found on the donor survey, most community survey respondents think United Way of Whatcom County should take a leadership role in identifying and addressing the most important and pressing issues for Whatcom County.

# What We Learned

- Very few community survey respondents indicated that kindergarten readiness and childhood literacy were top issues in Whatcom County. Poverty was one of the top four issues named, however, United Way of Whatcom County will still need to increase awareness and understanding of whatever issue is selected.

# What We Learned

- Community survey respondents felt families in poverty and employed families who struggle financially were significant problems in Whatcom County. Children not reading at third-grade level and children entering kindergarten unprepared to learn are not perceived to be as significant of problems in Whatcom County.

# What We Learned

- United Way of Whatcom County will need to actively communicate the prevalence of the selected issue and why it is important to address that issue.

**Do you have any  
questions about  
the community  
survey?**



# 2017 Board/Staff Survey



# General Overview of Survey

**14 questions**

**12 board members and 5 staff members  
were emailed on January 11, 2017**

**11 board members and 5 staff members  
completed the survey by January 20, 2017**

# Board & Staff Opinions

# Mission Statement

*“United Way of Whatcom County improves lives by mobilizing the caring power of our communities to advance the common good.”*

## Board



Current mission statement describes the mission



Revise the mission statement



Develop a new mission statement

## Staff



*We will discuss the mission statement during our Direction-Setting session on April 19<sup>th</sup>.*

# Primary Focus

*Education (2 board members)*

*Early education as it has a large multiplier effect*

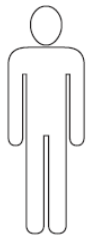
*Supporting working families that are struggling to provide basic needs (the ALICE group)*

*United Way should focus on educational programs such as early childhood, adult literacy, and keeping teen mothers in school.*

Many board members feel the primary focus of United Way of Whatcom County should be early childhood education or focusing on a specific issue. Staff members also named early childhood education or poverty as a primary focus. Ten of the board members and all five of the staff members provided a response.

# Three Years From Now – Funding

**Board**



United Way of  
Whatcom County  
should move toward  
more workplace  
campaigns



**Staff**



United Way of  
Whatcom County  
should move toward  
more diversified  
funding sources

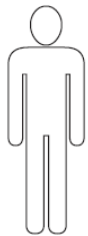


United Way of  
Whatcom County  
does not need to  
change

Question: Should the majority of funding for United Way of Whatcom County continue to come from workplace campaigns OR should our focus for fundraising for United Way of Whatcom County come from multiple sources, such as: grants, foundations, major gifts, government, and workplace campaigns?

# Three Years From Now – Success

**Board**



**Staff**



United Way of  
Whatcom County  
should move toward  
using financial  
measures to gauge  
success

United Way of  
Whatcom County  
should move toward  
using outcome  
measures to gauge  
success



United Way of  
Whatcom County  
does not need to  
change

Question: Should United Way of Whatcom County gauge success primarily using dollars raised and granted out OR should United Way of Whatcom County gauge success by how much of a difference was made addressing a specific issue?

# What We Learned

- All but one board member and all of the staff would like to revise the current mission statement or develop a new mission statement for United Way of Whatcom County. We will discuss the mission statement during our Direction-Setting session on April 19<sup>th</sup>.

# What We Learned

- All but one board member and all of the staff members felt United Way of Whatcom County should move toward more diversified funding sources and using outcome measures to gauge success.

**Do you have any  
questions about  
the board/staff  
survey?**



# Partner Agency Meeting



# **General Overview of Meeting**

**On January 4, 2017, United Way of Whatcom County staff held a meeting with top management and board members from United Way of Whatcom County's current partner agencies to discuss adopting a single issue focus.**

**During this meeting, the following questions were discussed:**

- What do you expect from United Way of Whatcom County?**
- What questions/concerns do you have about United Way of Whatcom County adopting an issue focus?**
- How can we work together to resolve the issue of:**
  - Employed families struggling financially (ALICE)?**
  - Families living in poverty in Whatcom County?**
  - Kids not reading at grade level by the end of third grade?**
  - Children entering kindergarten unprepared to learn?**

# **Issue Focus Questions & Concerns**

- **How long will this take?**
- **An issue focus could lose or gain donors**
- **The goal needs to be reasonable and not overwhelming**
- **Could there be smaller goals in the big goal?**

# **How Can We Work Together – Poverty/ALICE?**

- **Provide affordable housing, affordable child care, and affordable health services**
- **Support living wage**
- **Provide skills that lead to self-sufficiency and employment**
- **Clearly identify ALICE families**

# **How Can We Work Together – Reading at Grade Level/ Kindergarten Readiness?**

- **Improve parenting skills and provide support for families**
- **Coordinate countywide efforts among programs**
- **Focus on pre-K programs**

# What We Learned

- Partner agencies have questions about an issue focus and shared ideas about how they could work together with United Way of Whatcom County. Partner agencies shared many ideas about how the issues could be addressed.

# Top Campaign Interviews



# General Overview of Interviews

**United Way of Whatcom County contacted the following 15 top company campaigns and top individual donors from January to March 2017, and asked them about their awareness and potential support of the four issues United Way of Whatcom County is considering:**

- **Individual Donors Michael & Betsy Schneider**
- **Washington Federal Tom Kenney**
- **Individual Donor Joe McClain**
- **Bob Allendorfer BP Cherry Point Refinery**
- **HUB International Barry Hanson**
- **US Bank Mike Burke**
- **Individual Donor Eric Hirst**
- **WTA Pete Stark**
- **Jack Louws Whatcom County**
- **Ferndale School District Linda Quinn**
- **PowerTek Electric Spencer Palmer**
- **Bellingham School District Greg Baker**
- **PeaceHealth Chris Phillips**
- **Bellingham Cold Storage Doug Thomas**
- **Samson Rope Andrea Sturm**

# What We Learned

- Top company campaigns currently support a variety of issues including:
  - Education
  - Housing
  - Health
  - Basic needs

# What We Learned

- All of the top company campaigns and top individual donors said their support of United Way of Whatcom County will stay the same or increase if United Way of Whatcom County focuses on the issue of children entering kindergarten unprepared to learn, children not reading at grade level by the end of third grade, or employed families who struggle financially. Only one organization indicated their company support would decrease if United Way of Whatcom County focused on the issue of families in poverty.

# Top Campaign Comments

*Concerned about stability of nonprofits if funding is shifted.*

*Concerned about impacts on nonprofits and if donors will support change.*

*The bold goal must be very clear and relatable.*

*Concerned about costs for data analysis and selection of metrics.*

*Interested in public/private venture to connect those in poverty with employment.*

# United Way Networking



# General Overview of Networking

**United Way of Whatcom County contacted five United Ways to learn from their experiences in adopting an issue focus:**

- **United Way of Central Virginia**
- **United Way of Northern Nevada and the Sierra**
- **United Way of the Lakeshore**
- **United Way of Wayne & Holmes Counties**
- **United Way of Wells County**

**Perspectives contacted United Way of Snohomish County to understand their experience with an issue focus.**

# About Our Issue

*“We considered five community issues and selected poverty/ALICE. The latest ALICE update showed the percentage of households living in ALICE dropped three percent and the percentage of households living in poverty dropped by one percent.”*

**– United Way of the Lakeshore**

*“We are laser-focused. We try to look at everything through the lens of early education and ask how is this benefiting 0- to 5-year-olds? I am looked at as the expert in the community for early childhood education.”*

**– United Way of Wells County**

# Marketing/Engagement Lessons

*“We could have done a better job communicating the process. We did a lot behind closed doors. We did not have a clear message with the board, volunteers, or staff. We were unclear about what we were doing in many aspects. We did not create an external message, we did not ask the board to be ambassadors, and we did not invite the community to be a part of the process.”*

**– United Way of Snohomish County**

# Impact/Investment Lessons

*“To truly focus on a single issue means that some things will not fit – they will not be funded. We should have connected these programs to other funders. We only saw ourselves as a funder for these programs and we could have done more. There will be some partners who will not receive funding, and they will be O.K. with United Way making this move. Choose your population to be served.”*

**– United Way of Snohomish County**

*“It’s made it harder because we added our new focus to our three categories of education, income, and health. The issue needs to be pulled out completely. We should have done it differently. There is no need to continue to use categories.”*

**– United Way of Wells County**

# Resource Development Lessons

*“One woman was fed up with United Way, but we got her back because of our issue focus. She gave \$30,000 in the first year and \$30,000 in the second year because we were issue-focused. The downside is that campaign is down 4 or 5% this year. I would not attribute that to the poverty message. It has to do with external forces.”*

## **– United Way of Wayne & Holmes Counties**

*An issue focus has not enabled UWCV to raise more money from the workplace campaign, but an issue focus has garnered more support for UWCV’s work, such as corporate gifts.*

## **– United Way of Central Virginia**

# Other Lessons

*“We added a new full-time employee since the transition and our board didn’t even blink an eye. The board has a lot of trust in the staff and bold goal – that’s really fueling the solid relationship the board has with the mission and bold goal.”*

## **– United Way of Wayne & Holmes Counties**

*“This is not a quick fix. Seeing results takes a lot of time. It’s not going to happen tomorrow.”*

## **– United Way of Wells County**

*A positive result of being issue-focused is higher volunteer engagement.*

## **– United Way of Northern Nevada and the Sierra**

# Issue Case Statements

A close-up photograph of a brown leather strap, possibly from a bag or belt, set against a dark blue background. The leather has a fine, pebbled texture and is stitched with a darker thread. A small, dark, circular spot is visible on the surface of the strap, which is the central focus of the image. The lighting creates highlights and shadows, emphasizing the texture and the imperfection.

# Issue Case Statements

- Lifting Families/Individuals out of Poverty
- Preparing Children for Success



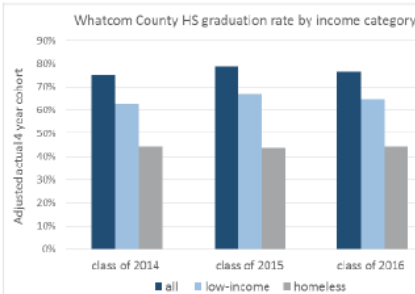
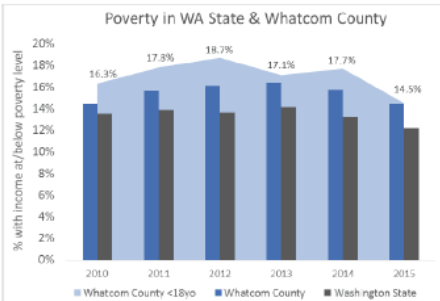
United Way of Whatcom County

## Fact Sheet

# Lifting Families/Individuals out of Poverty

### Statistical Overview:

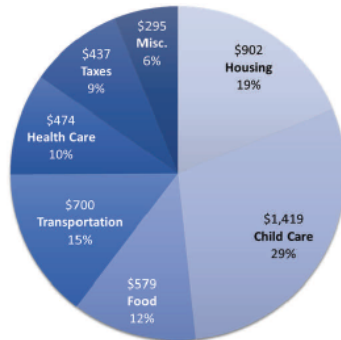
We know from the ALICE study that 42% of Whatcom County is struggling to make ends meet, unable to afford basic needs each month. There is a clear link between education and income: when teens don't graduate from high school they have less earning potential and are more likely to raise families in poverty/ALICE. The lower the income of the student's family, the lower the rate of graduation (and it is much worse for students who are homeless). While a variety of services exist to support struggling families and individuals in our community, there are gaps in creating equity.



### Why it Matters:

- Median Wage:** 50% of the 81,010 jobs in Whatcom County pay \$17.75 or less (\$34,080 a year). Only 25% of jobs (20,252) pay \$27.01 or higher. Median household income in 2013 for Whatcom County was \$50,186 well below WA State \$58,405
- Housing issues:** The median renter income in Whatcom County is \$31,460 yet to afford a basic 2-bedroom unit requires an annual income of \$36,400. This is equivalent to having a full-time job paying at least \$17.50/hour, or 1.8 people working full time at minimum wage (A minimum wage earner would have to work 74 hours per week to afford the same unit.)
- Vulnerable populations:** 50% of Meals on Wheels clients are at or below the Federal Poverty Level (have seen a 33% increase in delivered meals). More than 50% of Bellingham Food Bank clients are seniors and children. The poverty rate increases to >20% among children 5 and under (state and county)
- Education and Income linked:** More than 1/3 of residents 25 and older (who are below the Federal Poverty Level) in Whatcom County have at most a high school diploma
- Job skills gap:** only 31% of WA State students from the class of 2006 achieved a credential within 7 years

Survival Budget Family of 4 - Whatcom County



WA State median household income	\$ 58,405
Whatcom County survival budget (family of 4)	\$ 57,672
Whatcom County median household income	\$ 50,186
Federal Poverty Level (family of four)	\$ 23,550

### Gaps and Opportunities (themes from experts):

- More focus on needs of ALICE population, many can't access services due to not being in poverty
- Provide better scaffolding for a holistic approach to helping ALICE families and those in poverty
- Break the cycle of poverty/ALICE, support families from early learning through graduation
- Creating equity for families and individuals of all types
- Better more accurate data on the issues around poverty
- Living wages for those working in the childcare industry
- Poverty rates for the most vulnerable in our community, children and seniors, are important factors to consider when directing financial support

### Current United Way Partners working on this issue:

- Bellingham Food Bank - Free Grocery Program
- FamilyWise Prescription Drug Access Program
- Lydia Place - Transitional Housing Program
- Mercy Housing NW - Service Enriched Farm Worker Program
- Northwest Youth Services - Transitional Living
- Opportunity Council - Financial Stability Program
- Project Homeless Connect
- Salvation Army - Comprehensive Family Multi-Services
- Sun Community Services - Transition to Community
- Sustainable Connections - Food to Bank On
- Whatcom Alliance for Health Advancement
- Whatcom Family YMCA - Community Showers Program
- Whatcom Literacy Council - Literacy Tutoring for Adults
- Work Opportunities - Individualized Employment Programs
- YWCA - Homeless Housing for Women
- Whatcom Council on Aging (in health category but work with vulnerable populations, low income)

### Local groups working on this issue not affiliated with United Way:

- Catholic Community Services NW
- Habitat for Humanity
- Lighthouse Mission
- Love Inc. of Whatcom County
- Volunteers of America
- The Whatcom Dream
- Washington Work First
- Local churches and religious organizations
- 7 local school districts
- City of Bellingham
- Whatcom County Government
- Economic Development
- Northwest Workforce Council
- Northwest Economic Council
- Work Source
- Bellingham Technical College
- Whatcom Community College

### Potential Bold Goals Related to Poverty/ALICE:

- ⇒ Cut poverty in half by the year \_\_\_\_\_
- ⇒ \_\_\_\_\_ % out of poverty by the year \_\_\_\_\_
- ⇒ Decrease by \_\_\_\_\_ % the number of households below ALICE threshold by the year \_\_\_\_\_
- ⇒ Lift \_\_\_\_\_ (number of families/individuals) above the ALICE threshold by the year \_\_\_\_\_

Do you consider this to be a significant issue in	Donor Survey	Community Survey
Families in poverty	88%	84%
Employed families who struggle financially (ALICE)	77%	79%



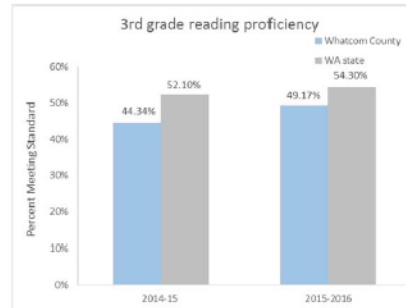
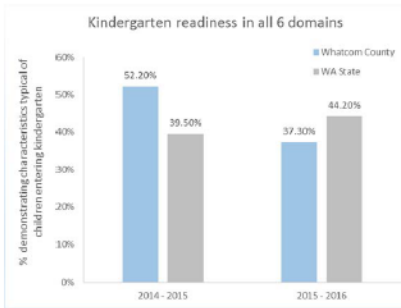
United Way  
of Whatcom County

## Fact Sheet

### Preparing Children for Success

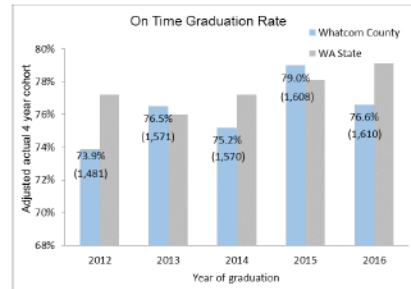
#### Statistical Overview:

Children need access to high-quality, affordable early learning experiences to enter school ready to learn, be reading at grade level by the end of 3rd grade, and graduate high school. Without this, children begin their primary school experience at a disadvantage. Affordable child care options are lacking in Whatcom County (capacity only accommodates ~30% of children under the age of 5 in a licensed child care facility). This has resulted in waiting lists for those eligible for EACAP and Head Start as well as programs without income restrictions.



#### Why it Matters:

- Science:** 85% of brain development occurs before age 3
- Setting up for success:** High-quality early learning experience improves primary school performance for all groups (especially lower income)
- Hard to catch up:** Educational gap (or achievement gap) increases over time among students that begin primary school behind their peers
- Parents need support:** 60% of Whatcom County families with children under 6 have both parents in the labor force
- Highest cost for families:** Childcare is the highest expense for a family in Whatcom County (average \$1,419/month for a family with 2 children)
- Capacity issues:** In Whatcom County the number of licensed child care providers dropped from 153 to 113 reducing the capacity for children from 3,602 to 3,197 (from 2011-2016)
- Increased drop-outs:** Students not reading proficiently by the end of 3rd grade are 4 times more likely to drop out of high school (6 times if also in poverty). *Reading shifts during 3rd grade from a "learning to read" to a "reading to learn" paradigm*



- Not ready to learn:** In Whatcom County at least 30% of kindergarteners enter school having not attended any preschool or licensed child care
- Decreased income:** Not having a high school diploma negatively impacts earning potential
- Link to poverty:** More than 1/3 of residents 25 and older (who are below the Federal Poverty Level) in Whatcom County have at most a high school diploma

#### Gaps and Opportunities (themes from experts):

- More access/enrollment to childcare/early learning, and more affordability
- Needs to be more support for struggling young families, more support for single mothers
- Increased outreach to diverse and rural communities to get them engaged in early learning
- Reduce Adverse Childhood Experiences (ACES) to increase health and learning
- More support needed for entire family, not just the kids but parents/guardians as well
- Better more accurate data tracked through the schools before and beyond
- Living wages for those working in the childcare industry

#### Current United Way Partners working on this issue:

- Bellingham Childcare/Learning Center– Affordable Childcare
- Boys & Girls Clubs – Academic Success
- Bellingham Public Schools Foundation - GRADS Program
- Home Port Learning Center
- Lydia Place – Parent Support Program
- Northwest Youth Services—housing support for youth
- Opportunity Council – Homeless Child Care
- Rebound of Whatcom County– Rebound Roots program
- Whatcom Center for Early Learning – Birth to 3 program
- Whatcom Early Learning Alliance – Kaleidoscope Learn/Play
- Whatcom Family YMCA – Early Learning/School Age Enrichment
- WWU Foundation/Woodring College of Ed/Bellingham Public Schools – Closing the Opportunity Gap

#### Local groups working on this issue not affiliated with United Way:

- Administration for Children and Families Head Start
- ECEAP (Early childhood Education and Assistance Program)
- Child Care Aware of NW WA
- Early Achievers
- ELAFS (Early Learning and Family Services)
- CIP (Collective Impact Partnership)
- FSC (First Steps Coalition)
- Whatcom Taking Action
- SEAS (Single Entry Access to Services)
- GIDES (General Interdisciplinary Developmental Evaluation System)
- WFCN (Whatcom Family & Community Network)
- Whatcom County Health Department
- 7 local school districts
- City of Bellingham / Whatcom County
- Local churches and religious organizations

#### Potential Bold Goals Related to Early Learning:

- ⇒ Increase by \_\_\_% the number of children who are enrolled in childcare or early learning by the year \_\_\_\_
- ⇒ Increase by \_\_\_% the amount of Kindergarteners ready in all 6 domains in Whatcom County by the year \_\_\_\_
- ⇒ Achieve \_\_\_% third grade reading proficiency by the year \_\_\_\_
- ⇒ Increase graduation rate by \_\_\_!% by the year \_\_\_\_

Do you consider this to be a significant issue in Whatcom County?	Donor Survey	Community Survey
Children not reading at grade level by end of 3rd grade	62%	50%
Children entering kindergarten unprepared to learn	51%	32%

# Bold Goal



# Bold Goal

- An issue-focused United Way has a bold goal of what they will achieve addressing their issue
- The bold goal for the issue replaces the campaign goal
- The bold goal is public and easily measured by the public
- Investment decisions are made to achieve the bold goal

# **A bold goal answers:**

How much will United Way achieve?

# United Way of the Bay Area

United Way of  
the Bay Area

LIVE UNITED



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JOIN US TO CUT POVERTY IN HALF BY 2020



## 1 IN 5 BAY AREA RESIDENTS LIVE IN POVERTY

United Way of the Bay Area is harnessing creativity, expertise, and philanthropy to cut poverty. » [Learn more about our work.](#)

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LIVE

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# United Way of Grand Forks, EGF & Area



**LIVE UNITED**

**United Way  
of Grand Forks, East Grand Forks & Area**

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## OUR MISSION & VALUES

### Working to Reduce Poverty

The United Way of Grand Forks, East Grand Forks & Area was established in 1957.

We work with city and state agencies, schools, childcare centers, health care providers, and area non-profits.

#### Our Bold Goal:

By 2030, Grand Forks will have the lowest poverty rate among the four major cities in North Dakota (Fargo, Bismarck, Minot, Grand Forks).

#### Our Mission:

United to Positively Transform Lives and Build Strong, Caring Communities.

#### Our Vision:

Be the trusted leader in improving the quality of life in our communities.

#### Programs & Initiatives:

In addition to partnering with local non-profits, we also coordinate a few of our own programs - Toys for Tots, Undies Sundays, Dolly Parton's Imagination Library, and FamilyWize.



**GIVE**



**ADVOCATE**



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# United Way of Central Virginia

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## *Statisticks: The Zip Code Lottery*



### **What is United Way of Central Virginia doing to help our area children get ready for kindergarten and reach our goal of 90% Third Grade Reading Proficiency by 2025?**

In Academic Year (AY) 2015-16, UWCV launched several new programs and supported the work of its lead readiness partner Smart Beginnings Central Virginia to help over 13,000 children and their families in the counties of Amherst, Appomattox, Bedford, Campbell, and the City of Lynchburg enter school ready to succeed.

# Next Steps





## **Direction-Setting session – April 19<sup>th</sup>**

During our Direction-Setting session, we will discuss:

- Mission statement
- Issue
- Bold goal
- Measures of success

# Things to Do Prior to April 19<sup>th</sup>

- Review the donor survey report, community survey report, board/staff survey report, partner agency meeting summary, top campaign interviews summary, United Way networking summaries, and issue case statements
- Think about what should be included in the mission of United Way of Whatcom County
- Think about what issue United Way of Whatcom County should take the lead addressing and a bold goal for that issue

**Do you have any  
questions about  
topics we haven't  
covered?**





**THANK  
YOU**

**GIVE. ADVOCATE. VOLUNTEER.**





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